

Use these instructions to apply for LOMA course credit through a credit transfer from other programs.

How to Apply for Transfer Credit

- If you do not already have a LOMA Student record, create one in [LOMA's learning system](#). This will establish a LOMA Test ID for you, which you will need as you progress through LOMA designation learning.

Identify Transfer Credits for Application

- Designations offered by other learning providers for which LOMA grants credit are shown on the last page for your reference, and they are listed on the application form. Locate the appropriate designation(s) you have already earned from other learning providers, and then select the corresponding course(s) for which you would like credit in LOMA's designation programs. **You may use transfer credit toward a maximum of three (3) LOMA courses.**

Submit Payment

- There is a fee of \$70 per course for which LOMA credits are granted. Transfer credits cannot be invoiced to your company — you must pay by credit or debit card.
- After completing the application, you will receive an email confirmation that includes your total amount due and a link to complete your purchase. You must submit your payment before your request can be processed.

Submit Documentation

- You must submit an official transcript or other verifiable document from the sponsoring organization of each designation for which you are applying for LOMA transfer credit. Acceptable documentation includes a printout of your course history, a copy of your grade report, or a copy of your diploma. LOMA reserves the right to contact the sponsoring organization to confirm your award.
- Email documentation to education@loma.org.

Additional Transfer Credit Rules

- LOMA will approve credit for only those designations and those LOMA courses shown on this application.
- You must have successfully completed the applicable designation program to be eligible for LOMA transfer credit.
- **Students may use transfer credit for a maximum of three (3) LOMA courses.**
- All steps listed above must be completed for this application to be processed.
- LOMA processes transfer credit requests weekly. Any credits granted will be formally communicated to you and will appear on your LOMA student record immediately.

How to Apply for Transfer Credit

1. Click [here](#) to open the Transfer Credit Application form.
2. Enter your first name.



3. Enter your last name.
4. Enter your LOMA test ID.
5. Enter your phone number.
6. Enter your email address. This is the email address we will use to communicate with you about your transfer credit status.
7. Click Next.
8. **Select up to three (3) LOMA courses** for which you would like to apply for transfer credit.
9. Select the total number of transfer credits requested.
10. Click Submit.
11. Check your email for the confirmation and payment link.

How to Complete Your Purchase

1. Log in to [LOMA's learning system](#).
2. Search for Transfer Credit in the catalog search field.
3. Click Transfer Credit.
4. Update the quantity to reflect the total number of transfer credits for which you are applying.
5. Click Add to Cart.
6. You will see a message showing that the item was added to the cart.
7. Click the cart icon in the upper right corner.
8. Review your order to verify your cart's total matches your email.
9. Click Checkout.

Provide Shipping details

1. Although no product will be shipped to you regarding transfer credits, please verify that your shipping address is correct in the system.
 - a. If correct, click Ship to This Address.
 - b. If incorrect, click Edit.
 - i. Enter your information.
 - ii. Click Save.

Select Payment Method

1. Select Credit Card (Cybersource). Transfer Credits cannot be invoiced to your company — you must pay by credit or debit card.
2. Click Use This Payment Method.
3. Click Edit next to Billing Address to update your billing address if needed.
4. Click Save.

Place Order and Enter Payment Details

1. Review your order to make sure it is complete and correct.
2. Accept the terms and conditions in the lower right corner before clicking Place Order.
3. You will be redirected to Cybersource, a secure third-party website, for payment.
4. Enter all required fields for the credit card transaction.
5. Click Next.
6. If all of your payment details are correct, click Pay.

Order Confirmation and Receipts

You will see an order confirmation notification, order number, and receipt when the order has been processed. You will also receive an order confirmation email from support@cybersource.com.

You can also print a receipt from inside LOMA's learning system.

1. Select Purchases/Receipts from the drop-down menu next to your initials in the upper right corner of the screen.
2. Locate the transaction and click View Details.

CONTACT LOMA

Phone: 770-984-3761

Website: www.loma.org

Email: education@loma.org

Industry Designations that may be eligible for transfer credit toward LOMA Designations

If you have earned this designation:	You may apply for credit toward:	Corresponding Course Title:
Associate of the Canadian Institute of Actuaries (ACIA) or Associate of the Society of Actuaries (ASA)	☐ LOMA 307 / 308 ☐ LOMA 371	The Business of Insurance: Applying Financial Concepts Risk Management and Product Development for Life Insurance Companies
Associateship of The Malaysian Insurance Institute (AMII)	☐ LOMA 307 / 308 ☐ LOMA 311	The Business of Insurance: Applying Financial Concepts Business Law for Insurance Professionals
Associatship of the Chartered Insurance Institute (ACII)	☐ LOMA 311	Business Law for Insurance Professionals
Chartered Financial Analyst (CFA®) or Chartered Investment Manager (CIM®)	☐ LOMA 307 / 308 ☐ LOMA 357	The Business of Insurance: Applying Financial Concepts Institutional Investing: Principles and Practices
Certified Financial Planner (CFP®)	LOMA 280 / 281 ☐ or SRI 111 ☐ SRI 131	Meeting Customer Needs with Insurance and Annuities or Retirement Fundamentals Planning for a Secure Retirement
Chartered Financial Consultant (ChFC®)	☐ SRI 131 ☐ LOMA 307 / 308	Planning for a Secure Retirement The Business of Insurance: Applying Financial Concepts
Chartered Life Underwriter® (CLU®) or Diploma in Life Insurance (DLI) or Fellow, Insurance Institute of India (FIII)	☐ LOMA 280 / 281 ☐ LOMA 311	Meeting Customer Needs with Insurance and Annuities Business Law for Insurance Professionals
Chartered Property Casualty Underwriter (CPCU) - Personal or Commercial Concentration <i>* Must provide proof that you are still a CPCU in good standing</i>	LOMA 307 / 308 ☐ or SRI 131	The Business of Insurance: Applying Financial Concepts or Planning for a Secure Retirement
Fellow of the Canadian Institute of Actuaries (FCIA) or Fellow of the Society of Actuaries (FSA) or Chartered Enterprise Risk Analyst (CERA)	LOMA 280 / 281 ☐ or SRI 111 ☐ LOMA 307 / 308 ☐ LOMA 371	Meeting Customer Needs with Insurance and Annuities or Retirement Fundamentals The Business of Insurance: Applying Financial Concepts Risk Management and Product Development for Life Insurance Companies
Insurance Foundations Certificate Examination (IFCE) or Life Licence Qualification Program (LLQP)	☐ LOMA 280 / 281	Meeting Customer Needs with Insurance and Annuities
Retirement Income Certified Professional (RICP)	☐ SRI 111	Retirement Fundamentals

You may use transfer credit toward a maximum of three (3) LOMA courses.