

# Application for an exam entry refund

Post closing date

This form is to be used by candidates applying for a refund after the exam closing date.

**Please note the following:**

- All applications must consist of an explanatory covering letter and supporting documentation such as a medical certificate or doctor's note.
- All applications will incur an administration charge of 20% of the exam entry fee.
- No applications can be accepted from candidates paying special overseas rate fees.
- All applications must be submitted within three weeks of the examination date.
- No refund will be given if a candidate is present for the exam.
- Applications will be processed six weeks after the exam date.

**Please return your completed form within 3 weeks of the exam date, to:**

Exams Team, Institute and Faculty of Actuaries, Napier House, 4 Worcester Street, Oxford, OX1 2AW, UK  
Email: [examinations@actuaries.org.uk](mailto:examinations@actuaries.org.uk) Fax: +44 (0) 1865 268 222

**Personal details:**

ARN: \_\_\_\_\_ Name: \_\_\_\_\_

**Entry details:**

Session: \_\_\_\_\_ Exam centre: \_\_\_\_\_

Exam(s): \_\_\_\_\_

**Refund details:**

Reason for request: \_\_\_\_\_

**Refund method:**

**Refunds must be made to the payee of the exam entry fee using the same method of payment.**

BACS (Bank details must be attached) \_\_\_\_\_

Credit Card    Visa     Mastercard     Switch

Card No.: \_\_\_\_\_ (Switch only) Start Date: \_\_\_\_\_ Expiry Date: \_\_\_\_\_ Security Code: \_\_\_\_\_ (Switch only) Issue No.: \_\_\_\_\_

**In submitting this form I confirm I have read and understood the examination policies, regulations and notes issued.**

Candidate name (block capitals): \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**OFFICE USE ONLY**

Refund authorised: \_\_\_\_\_ Notes: \_\_\_\_\_

Withdrawn: \_\_\_\_\_

Refund amount: \_\_\_\_\_

Refund issued: \_\_\_\_\_



## Bank details form

Please ensure you complete the relevant section dependent on the location of your bank. If your bank is in the UK please complete the BACS form. If your bank is abroad please complete the Bank Transfer form.

\*Compulsory

BACS Form – Payments to a UK bank account	
*Payee account name:	
*Bank name:	
Bank address:	
*Bank account number:	
*Bank sort code:	

Bank Transfer Form – Payments to an overseas bank account	
*Payee account name:	
*Bank name:	
Bank address:	
*Bank account number:	
*Bank sort code:	
*Swift code:	
*IBAN number:	

## Exam entry refunds

Refunds of exam entry fees will only be granted to candidates that have paid the full fee and meet the criteria below.

All applications must be clearly titled '**Refund Request**' and must be sent separately to any other applications or correspondence.

### **Before the exam entry closing date (Pre closing date application):**

Refunds will only be given to those who pay the full fee and submit an application form to the Exams Team **on or before** the exam entry closing date.

Supporting documentation is not required with this form. No administration fee will be charged.

Candidates paying special overseas rate fees are not entitled to apply for a refund under any circumstances due to administrative costs.

### **After the exam entry closing date (Post closing date application):**

Refunds will only be given to candidates who pay the full fee that are unable to sit the exam due to circumstances beyond their control, such as illness or accident. Post closing date applications must be sent to the Exams Team within **three weeks** of the exam date.

All refunds will incur an administration charge of 20% of the exam entry fee.

Candidates paying special overseas rate fees are not entitled to apply for a refund under any circumstances due to administrative costs.

Post closing date refund applications must consist of a completed application form, an explanatory covering letter and supporting documentation such as a medical certificate or doctor's note.

### **Examples of acceptable forms of supporting documentation are:**

- Unexpected illness/injury – medical certificate or doctor's note
- Incident/emergency – police or fire certificate
- Death of family member – death certificate or letter from employer
- Unexpected loss of job – letter from employer (termination of contract letter)

Please note that requests for refunds after the closing date are not automatically granted and each request is considered on an individual basis.

### **The following situations are not acceptable grounds for a refund:**

- Very busy at work/not enough time to study
- Not prepared for the exam
- Event on same day - wedding, holiday, business meeting, etc.
- Pre-existing medical condition
- Exemption or pass in alternate subject
- Moving house
- Did not receive entry permit

Applications must be emailed to: [examinations@actuaries.org.uk](mailto:examinations@actuaries.org.uk) or sent to the following address.

Refund Administrator (Exams)  
The Institute of Actuaries  
Napier House  
4 Worcester Street  
Oxford OX1 2AW

Refund requests will not be processed until four weeks after the exams have taken place and candidates will be informed of the outcome in writing.

No refund will be given if a candidate is present for the exam, regardless of whether any of the exam questions were attempted. If candidates feel that they were unable to complete the exam due to illness, it is recommended that they submit an application for mitigating circumstances.

Candidates that attend one part of the CA1 exam but are unable to attend the other will still have their attempt marked. They will be eligible to apply for a partial refund of the exam entry fee for the part that they did not sit subject to the criteria detailed above.