



CLMA Application For Admission

Application Instructions

1. This is a values-based, professional admissions application.
2. Complete all sections in full. Required fields are marked with (*).
3. Your application will be reviewed upon receipt of the non-refundable application fee.
4. Qualified applicants may be invited to an admissions interview.
5. If accepted, the application fee is paid and remaining courses are \$100 each.

SECTION 1: Applicant Information

Full Legal Name (*)

Preferred Name

Email Address (*)

Mobile Phone (*)

Home Address (*)

City, State, & Zip (*)

Time Zone (*) East. Cent. Mntn. Pacf. Other

LinkedIn Profile (optional)

SECTION 2: Professional Background

Current Profession / Role (*)

Company / Organization

Years of Professional Experience working one-on-one with clients (*)

- ☐ 3–5 years
- ☐ 6–10 years
- ☐ 11–20 years
- ☐ 20+ years

Primary Area(s) of Practice (check all that apply) (*)

- | | |
|---|--|
| <input type="checkbox"/> Financial Services / Wealth Management | <input type="checkbox"/> Insurance / Risk Management |
| <input type="checkbox"/> Real Estate / Mortgage | <input type="checkbox"/> Accounting / Tax Planning |
| <input type="checkbox"/> Coaching / Counseling / Mentorship | <input type="checkbox"/> Ministry / Faith-Based Leadership |
| <input type="checkbox"/> Healthcare / Wellness | <input type="checkbox"/> Education / Training |
| <input type="checkbox"/> Business Ownership / Entrepreneurship | <input type="checkbox"/> Other: _____ |

SECTION 3: Licenses, Credentials & Certifications

Please list all current or prior licenses, credentials, or certifications, including issuing organization and years held:

SECTION 4: Alignment With the CLMA Philosophy

The CLMA designation is built on the belief that life decisions and financial decisions are inseparable and that advisors must guide clients across Relationships, Health, Finance, and Personal Growth.

1. Why are you pursuing the Certified Life Management Advisor (CLMA) designation? (*)
2. How do you currently help clients beyond traditional technical or transactional advice? (*)
3. Describe a situation where a client's personal life significantly impacted their financial or professional decisions. (*)

SECTION 5: Ethics, Integrity & Professional Growth

1. How do you handle complex or emotionally sensitive client situations? (*)

2. Describe an unintentional professional mistake made while trying to help a client, and what you learned from it. (*)

3. Why do you believe a supportive, education-first certification model is important in today's advisory environment? (*)

SECTION 6: Commitment & Program Acknowledgments

Please review and acknowledge each statement below:

- ☐ I understand this is a rigorous, values-based certification program
- ☐ I am willing to engage in personal reflection and professional growth
- ☐ I agree to uphold the ethical standards and mission of the LMA Certification
- ☐ I understand acceptance into the CLMA program is not guaranteed

Anticipated Start Cohort (*)

☐ March 2026 – Founding Cohort

☐ June 2026

☐ September 2026

SECTION 7: Application Fee (Required)

Application Fee: \$300 (Non-Refundable) Your application will be reviewed upon receipt of payment. **Secure Payment Link:** www.paypal.com/ncp/payment/5RHQE898MVCR2

SECTION 8: Applicant Affirmation & Digital Signature

I certify that the information provided in this application is true and accurate to the best of my knowledge. I understand that acceptance into the CLMA program is based on professional qualifications, alignment with program values, and admissions review.

Typed Full Name (Digital Signature) (*)

Date:

Save Form & Email To: Info@CertifiedLMA.com