

Continuing Education: What Other Designations Qualify

eMoney Virtual Summit 2020 October 19-21

Apply 2020 Summit Continuing Education credits to other designations

Did you know that due to the updated CFP Code and Standards, technology training qualifies as continuing education for the CFP Board?

Now, even more of our sessions qualify to earn CFP CE credits, and you may also be able to apply your credits to your other designations.

National Association of Personal Financial Advisors (NAPFA)

- This is a professional organization with CE requirements, with no specific designations
- NAPFA recognizes programs that are accepted as CE by the CFP Board
- Visit www.napfa.org for more information

American College Designations

- Some examples include: WMCP®, RICP®, ChFC®, CLU®, FSCP®, ChSNC®, CAP®, CLF®, CASL®
- American College recognizes programs that are accepted as CE by the CFP Board
- Visit <https://www.theamericancollege.edu/> for more information

Certified Public Accountant (CPA)

- Dependent on the state board of accountancy in which the individual is registered
- Generally recognizes programs that are accepted as CE by the CFP Board
- Visit <https://www.nasbaregistry.org/cpe-requirements> for more information

CFA Institute

- Dependent on the state board of accountancy in which the individual is registered
- Generally recognizes programs that are accepted as CE by the CFP Board
- Visit <https://www.nasbaregistry.org/cpe-requirements> for more information

IWI (Investments and Wealth Institute)

- Some examples include: CIMA®/CIMC®/CPWA®/RMA®
- IWI generally recognizes programs that are accepted by the CFP Board
- Visit <https://investmentsandwealth.org/home> for more information

Insurance Licenses

- Dependent on the state in which the individual is licensed
- Generally do not recognize programs that are accepted as CE by the CFP Board
- Visit <https://www.statece.com/insurance/state-by-state-insurance-ce-requirements/> for more information

How It Works

After the event, we'll send certificates of completion to attendees, which you can use to self-report your attendance to the governing body that oversees your additional designation(s).