

Continuing Education: What Other Designations Qualify

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 training and event 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 relevant knowledge topic requirements of the CFA Professional Learning (PL) program.
- Visit <https://www.cfainstitute.org/en/membership-professional-development/pl> 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 any training session or event, we'll email you an attendance record to attendees, so you can self-report your participation to the governing body that oversees your additional designation(s).