

CE Credit Matrix

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	CFP Board	College for Financial Planning	National Association of State Boards of Accountancy (NASBA) ¹	New Jersey State Board of Accountancy	Texas State Board of Accountancy
CFPE 1101 - Financial Planning Process & Insurance	NA	45	Credits-45, Level-advanced, Category: 20 Administrative Practice/4 Communication/5 Economics/8 Taxes/8 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Taxation	Credits-45, Level-advanced, Category: Communication/Ethics/Taxation/Other
CFPE 1102 - Investment Planning	NA	45	Credits-45, Level-advanced, Category: 5 Administrative Practice/5 Communication/ 5 Taxes/30 Specialized Knowledge	Credits-45, Level-advanced, Category: Mathematics and Statistics/Finance/Management Advisory Services	Credits-45, Level-advanced, Category: Quantitative Methods/Statistics/Other
CFPE 1103 - Income Tax Planning	NA	45	Credits-45, Level-advanced, Category: 5 Administrative Practice/5 Communication/ 30 Taxes/5 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Taxation	Credits-45, Level-advanced, Category: Quantitative Methods/Taxation/Other
CFPE 1104 - Retirement Planning and Employee Benefits	NA	45	Credits-45, Level-advanced, Category: 15 Administrative Practice/5 Communication/10 Taxes/15 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services	Credits-45, Level-advanced, Category: Communication/Quantitative Methods/Other
CFPE 1105 - Estate Planning	NA	45	Credits-45, Level-advanced, Category: 10 Administrative Practice/5 Communication/10 Taxes/20 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Taxation	Credits-45, Level-advanced, Category: Quantitative Methods/Taxation/Other
Graduate Degree Courses - 3 credit hour course	28 ²	45	NA	NA	NA
AAMS SM - Accredited Asset Management Specialist SM	45 ²	45	Credits-45, Level-advanced, Category: 10 Administrative Practice/5 Communication/5 Economics/15 Taxes/10 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Ethics	Credits-45, Level-advanced, Category: Communication/Ethics/Other
ADPA SM - Accredited Domestic Partnership Advisor SM	5 ²	28	Credits-30, Level-advanced, Category: 28 Specialized Knowledge	Credits-30, Level-advanced, Category: Finance/Management Advisory Services/Taxation	Credits-30, Level-advanced, Category: Taxation/Other
APMA SM - Accredited Portfolio Management Advisor SM	28	28	Credits-45, Level-advanced, Category: 45 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Ethics/Taxation	Credits-45, Level-advanced, Category: Ethics/Taxation/Other
AWMA SM - Accredited Wealth Management Advisor SM	45 ²	45	Credits-45, Level-advanced, Category: 15 Administrative Practice/5 Communication/5 Taxes/20 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Ethics	Credits-45, Level-advanced, Category: Communication/Ethics/Other
AWMA Challenger	30 ²	30	NA	NA	NA
CMFC SM - Chartered Mutual Funds Counselor SM	45 ²	45	Credits-45, Level-advanced, Category: 5 Administrative Practice/5 Communication/ 5 Taxes/30 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Ethics	Credits-45, Level-advanced, Category: Communication/Ethics/Other
CRPC SM - Chartered Retirement Planning Counselor SM	45 ²	45	Credits-45, Level-advanced, Category: 10 Administrative Practice/5 Communication/15 Taxes/15 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services	Credits-45, Level-advanced, Category: Communication/Ethics/Other
CRPS SM - Chartered Retirement Plan Specialist SM	45 ²	45	Credits-45, Level-advanced, Category: 10 Administrative Practice/5 Communication/15 Taxes/15 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services	Credits-45, Level-advanced, Category: Communication/Other
RP SM - Registered Paraplanner SM /FFPN - Foundations in Financial Planning	45 ²	45	Credits-45, Level-advanced, Category: 15 Administrative Practice/10 Communication/5 Economics/5 Taxes/10 Specialized Knowledge	Credits-45, Level-advanced, Category: Finance/Management Advisory Services/Ethics	Credits-45, Level-advanced, Category: Communication/Ethics/Taxation/Other
Advanced Professional Development Series - Current Issues in Retirement Planning	5	5	Credits-5, Level-advanced, Category: 1 Administrative Practice/1 Communication/1 Taxes/2 Specialized Knowledge	Credits-5, Level-advanced, Category: Management Advisory Services	Credits-5, Level-advanced, Category: Other
Advanced Professional Development Series - Diversification of International Holdings in Portfolios	5	5	Credits-5, Level-advanced, Category: 2 Administrative Practice/3 Specialized Knowledge	Credits-5, Level-advanced, Category: Management Advisory Services	Credits-5, Level-advanced, Category: Other
Advanced Professional Development Series - Tax Planning for IRA Benefits	5	5	Credits-5, Level-advanced, Category: 1 Administrative Practice/1 Communication/2 Taxes/1 Specialized Knowledge	Credits-5, Level-advanced, Category: Management Advisory Services/Taxation	Credits-5, Level-advanced, Category: Communication/Quantitative Methods/Taxation/Other
Advanced Professional Development Series - The Performance of U.S. Monetary Policy: 1980-2005	5	5	Credits-5, Level-advanced, Category: 1 Administrative Practice/2 Economics/1 Taxes/1 Specialized Knowledge	Credits-5, Level-advanced, Category: Management Advisory Services	Credits-5, Level-advanced, Category: Other

¹The following states do not accept CPE credits from the College due to QAS requirements: Florida, Minnesota, Mississippi, Oregon, South Carolina, Tennessee. The College for Financial Planning is registered with the National Association of State Boards of Accountancy (NASBA), Texas State Board of Accountancy and New Jersey State Board of Accountancy as a sponsor of continuing professional education and appears on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org.

² Please click [here](#) to view changes for courses completed after 12/31/2010.

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	CFP Board	College for Financial Planning	National Association of State Boards of Accountancy (NASBA) ¹	New Jersey State Board of Accountancy	Texas State Board of Accountancy
Advanced Professional Development Series - Stock Options, ISOs, Nonqualified Plans, and 409A	5	5	Credits-5, Level-advanced, Category: 2 Administrative Practice/3 Specialized Knowledge	Credits-5, Level-advanced, Category: Management Advisory Services	Credits-5, Level-advanced, Category: Other
Advanced Professional Development Series - Practice Development and Management	NA	5	Credits-5, Level-advanced, Category: 1 Social Environment of Business/1 Bus Mgmt & Org/1 Mgmt Advisory Services/1 Production	Credits-5, Level-advanced, Category: Management Advisory Services	Credits-5, Level-advanced, Category: Other

State Insurance CE Chart

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CFP Board sponsor # 129, NASBA sponsor # 103227, Texas State Board of Accountancy Sponsor # 169, New Jersey State Board of Accountancy Sponsor # 00020200