

CONTINUING EDUCATION INFORMATION

ASPPA Members

The Capital Forum on Pensions offers up to 7 hours of ASPPA CE credits. To receive CE credit, attendees must fill out the small Continuing Education Forms found in your tote bag to ensure accurate reporting. Attendance verification must be submitted at the end of each session and a confirmation email will be sent after the conference.

NIPA

The Capital Forum on Pensions offers up to 7 hours of NIPA CE credits. To receive CE credit, attendees must fill out the small Continuing Education Forms found in your tote bag to ensure accurate reporting. Attendance verification must be submitted at the end of each session and a confirmation email will be sent after the conference.

Attorneys (CLE Credit)

The Capital Forum on Pensions offers up to 7 hours of CLE CE credits. To receive CE credit, attendees must fill out the small Continuing Education Forms found in your tote bag to ensure accurate reporting. Attendance verification must be submitted at the end of each session and a confirmation email will be sent after the conference.

Enrolled Retirement Plan Agent (ERPA)

The Capital Forum on Pensions offers up to 7 hours of ERPA CE credits. To receive CE credit, attendees must fill out the small Continuing Education Forms found in the attendee folder to ensure accurate reporting. Attendance verification must be submitted at the end of each session and a confirmation email will be sent after the conference.

Actuaries (JBEA)

Co-Sponsor WP&BC of Sacramento is an approved continuing education provider for the Joint Board of Enrolled Actuaries. To receive CE credit, attendees must fill out the small Continuing Education Forms found in your tote bag to ensure accurate reporting. Attendance verification must be submitted at the end of each session and a confirmation email will be sent after the conference.

California and Oregon CPA's

The Capital Forum on Pensions offers up to 7 hours CE credits that can be applied to both California and Oregon CPA's.

AIF® and AIFA® - To receive credit for up to 2 hours of CE login to www.fi360.com and enter the designee portal. Select CE Home, then Non fi360 Produced CE. Complete the on-line form and submit. You are required to keep copies of the presentations and materials available.

CFP - CFP Board considers Live Programs to be educational sessions in which the instructor or discussion leader is conducting the program in real-time; the instructor or discussion leader and students are engaged in the educational program at the same time.

- Examples (non-inclusive): in-person sessions, seminars, sessions at conferences, panel sessions at conferences, structured discussion groups, live webinars, teleconferences, and college/university courses.

CE for Live Programs will be granted in an initial unit of at least one-hour (minimum of 50 minutes constituting one class hour), with half-hour increments accepted after the initial one hour has been satisfied. Total hours will be rounded down to the last full half hour.

- For example, a 75-minute program equals 1.5 credits. Partial credit may be claimed for those portions of programs that cover material from the accepted subject topics. For example, three hours of CE credit may be claimed for a six-hour program that covers accepted topics during only half of the program.

Required Documentation for Manually Reported CE

Non-registered live programs submitted for review require the following documentation before a review will be begun:

- \$25.00 processing fee per course
 - Certificate of Completion/Attendance or unofficial transcript showing successful completion of program
 - Brochure, program outline or program description from the program provider (with actual dates and times), timed agenda or verification of classroom hours attended (minus lunches, breaks, and examination time)
- See more at: <http://www.cfp.net/for-cfp-professionals/continuing-education/continuing-education-policies#3>

Please check back periodically for updates. We will post pending and approved credit information as it becomes available.