

Continuing Education Conference Application

SECTION I: Contact Information

CE Sponsor ID#: _____

Contact Name: _____

CE Sponsor Name: _____

Contact Telephone: _____

CE Sponsor Web site: _____

Contact Fax: _____

CE Sponsor Address: _____

Contact e-mail: _____

SECTION II: Conference Information

Conference Name: _____

Conference ID#: _____ Conference Contact: _____

Start Date: _____ End Date: _____ Frequency: One time only More than once Employee only

SECTION III: Submitting Programs in a Conference

- 1) Each session within the conference must be submitted as an individual program. Using the second page of this application, please provide the required information. If you need to submit more than seven programs, photocopy the second page prior to filling out.
- 2) Attach a brief description, including agenda and time frames, for each program. Do not send handouts or workbooks unless it clarifies your submissions.
- 3) To complete the topic hours requested, use the following subject codes.

- | | |
|---|------------------------|
| A. General Principles of Financial Planning | E. Income Tax Planning |
| B. Insurance Planning and Risk Management | F. Retirement Planning |
| C. Employee Benefits Planning | G. Estate Planning |
| D. Investment Planning | |

A complete list of topics under these subjects can be found in CFP Board's *CFP® Certification: Policies, Renewal Requirements and Continuing Education Standards* publication. If a program addresses more than one subject, please divide hours between each subject and provide total hours requested for that program.

SECTION IV: CE Conference Review Fee

Fee must accompany this form; fees subject to change; a \$25 service fee will apply to all returned checks

Total Amount Due: **\$50**

Please select method of payment:

Check Check Number: _____ VISA MasterCard American Express
(make check payable to CFP Board; do not staple check to application)

Name on Credit Card: _____ Card #: _____

Cardholder Signature: _____ Expiration Date: _____

SECTION V: Terms and Conditions

- We agree to comply with the Terms and Conditions of Continuing Education Sponsor Registration and the Continuing Education Standards as outlined in the *CFP® Certification: Policies, Renewal Requirements and Continuing Education Standards* publication, as amended from time to time.
- By submitting educational program(s) for acceptance by CFP Board for continuing education (CE) credit, we agree that CFP Board has not waived any of the rights it may have to pursue claims of trademark infringement or dilution. The acceptance of such program(s) by CFP Board does not constitute an endorsement of the program(s) or of any certificate or designation that is conferred as a result thereof.

CE Sponsor Name: _____

Contact Name (please print): _____

Contact Signature: _____ Date: _____



