CFP BOARD

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

CFP BOARD ETHICS CE REQUIREMENTS: LIVE WEBINAR DELIVERY

CE Sponsors offering Ethics CE using a live webinar format are required to ensure the integrity of the live delivery of the program as outlined below. The live webinar format will closely follow the published Timed Agenda allocation for content and activities during the **required 120-minute program**. View full program details <u>here</u>.

To be eligible for Ethics CE registration, a live webinar format must maintain a level of participant involvement throughout the presentation. Here is a summary of the additional steps required for this format:

- **Qualified Instructor**: The individual leading the Ethics webinar presentation must meet the same eligibility criteria as a Live Ethics CE instructor. View criteria <u>here</u>.
- Attendance:
 - The webinar software used must have the ability to date stamp and track attendee login and logout times, and participation in polling activity.
 - Each webinar attendee must sign-in using their own login.
 - The attendee must be logged in at the start of the webinar and remain logged in to the end of the program.
 - The attendee must actively participate in all polling activity.
- Setting Expectations: The Instructor will clearly state the expectation of full attendance, active participation and involvement in activities and the completion of a program evaluation as conditions for earning Ethics CE.
- **Presentation:** The Instructor will use the *Presentation Ready* slide deck that can be cobranded.
- Touch Points:
 - As with the Live Ethics CE presentation, the webinar must include polling questions and vignettes, as required, at the end of each learning objective.
 - These activities will require active participation by the attendee with an online response.
- Program Evaluation & Certificate of Completion:
 - A formal evaluation process is required at the conclusion of the program. The CE Sponsor can decide on the best way to distribute and collect program feedback.
 - Completion of the program evaluation is required before the Certificate of Completion is distributed and attendance is reported.

Please email <u>cesponsor@cfpboard.org</u> or call 202-379-2227 if you have any questions.