CFP BOARD

CERTIFIED FINANCIAL PLANNER BOARD OF STANDARDS, INC.

Need to
change your
password?
Follow these
steps.

CFP BOARD

My CFP Board Account

CE Sponsor Account

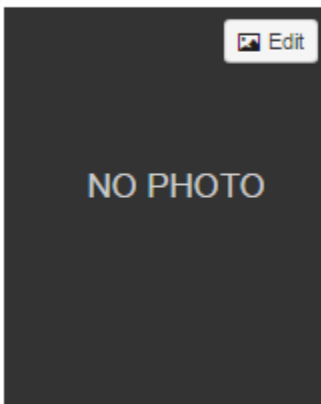Sponsor Management Profile

CE Attendance Reporting Profile

Manage Account

Personal Profile

Organization Profile

Tools and Resources

Manage Personal Profile

🖼 Edit

NO PHOTO

📍 Washington, DC
20005

✉
zzjoanna.truitt@verizon.netzz

👤 **Profile Details**

Name: **Ms. Joanna Truitt**

📍 1425 K Street
Washington, DC 20005

🔗 **Manage
Settings**

Change My Password

Change Password

Primary email: **zzjoanna.truitt@verizon.netzz**

New password:

Required

Confirm new password:

Required

Save   Cancel

Enhanced Program Management Features

CFP BOARD

- View programs entered but not yet submitted
- Follow the status of your program
- Easily respond to NMIs
- Download a list of active programs

CE Sponsor Management Profile

From this Profile view you can add new programs, view programs pending payment, under review and in Active status. During the renewal period, typically beginning in late October, you will be able to manage your sponsorship and program renewals.

My CFP Board Account

CE Sponsor Account

Sponsor Management Profile

CE Attendance Reporting Profile

Manage Account

Personal Profile

Organization Profile

Tools and Resources

Manage Sponsor Memberships

Your sponsorship renewal fee will need to be paid before additional programs can be submitted for review. Check the box under the *Pay* column, then *Add to Cart*; continue to checkout to make your payment.

Invoice #	Product	Bill Date	Total	Balance	View	Pay
2377127	CE Sponsor - Non Profit Renewal	01/31/2017	$250.00	$250.00	Details	☐

Add To Cart

View all membership invoices >

Manage Programs

Click *Add New Program* to submit a Live or Self-Study program for General or Ethics CE. General CE Program Requirements, CFP Board Ethics CE Program Requirements, detailed instructions, templates, and videos are available online.

+ ADD NEW PROGRAM

New: Pending Payment (1)	Under Review (4)	Active (5)

Title	Initial Save Date	Payment Deadline	Pay
Tax Reduction Management	05/23/2017	06/22/2017	☐

Select All   Add To Cart

View Inactive/Archived Programs >

Manage Program Renewals

Please pay your open sponsorship fee and then return to this screen to renew your programs.

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Pending Payment: View programs entered but not submitted

If the application is not paid before the deadline, 30 days after entry, it will be remove from your account. To pay for this program check the box under "Pay" and proceed to check-out.

Once paid, the program will move to "Under Review"

Manage Programs

Click *Add New Program* to submit a Live or Self-Study program for General or Ethics CE. General CE Program Requirements, CFP Board Ethics CE Program Requirements, detailed instructions, templates, and videos are available online.

+ ADD NEW PROGRAM

| New: Pending Payment (1) | Under Review (2) | Active (7) |

Title	Initial Save Date	Payment Deadline	Pay
Tax Reduction Management	05/23/2017	06/22/2017	☐

Select All   Add To Cart

View Inactive/Archived Programs >

Access the invoice for each program, program details (by clicking on the program title), program type, payment amount, payment date and status.

If program status is Needs More Information, follow the instructions in the email you receive. Click on the program title, scroll to the bottom of the page and add the requested documentation – everything is now done thru the system.

Once your program is accepted, it will move immediately under the "Active" programs tab….

Manage Programs

Click *Add New Program* to submit a Live or Self-Study program for General or Ethics CE. General CE Program Requirements, CFP Board Ethics CE Program Requirements, detailed instructions, templates, and videos are available online.

+ ADD NEW PROGRAM

New: Pending Payment (1)　　Under Review (2)　　Active (7)

Invoice #	Program	Type	Ethics?	Total	Latest Payment Date	Status
2381487	Investments for Youth	Live	No	$40.00	06/07/2017	Pending Review
2373188	Investment Planning	Live	No	$20.00	05/11/2017	Needs More Information

View Inactive/Archived Programs >

View all of your active programs. Download to excel, access the invoice, program detail, program ID and payment information.

The "Budget Code" is for your internal use to help track of program expenses.

Manage Programs

Click *Add New Program* to submit a Live or Self-Study program for General or Ethics CE. General CE Program Requirements, CFP Board Ethics CE Program Requirements, detailed instructions, templates, and videos are available online.

+ ADD NEW PROGRAM

New: Pending Payment (1)   Under Review (2)   Active (7)

Invoice #	Program	Program ID	Type	Ethics?	Total	Latest Payment Date	Budget Code
2381497	Strategies for Transfer of Property	235305	Live	No	$40.00	06/08/2017	4222
2381493	Retirement Planning	235304	Self-Study	No	$60.00	06/07/2017	
2376992	Asset Diversification	235281	Live	No	$80.00	05/16/2017	4222
2376992	Retirement Planning - Starting Early	235280	Live	No	$80.00	05/16/2017	4241 CE
2373189	Dealing with Elder Care	235277	Live	No	$60.00	05/11/2017	4111 Annual
2373189	Debt Management for Gen X	235276	Live	No	$60.00	05/11/2017	4111 Annual
2373189	Tax Planning for 2018	235275	Live	No	$60.00	05/11/2017	4111 Annual

First   Prev   **1 of 1**   Next   Last

Download Active Programs

View Inactive/Archived Programs >

Revised Program Submission Process

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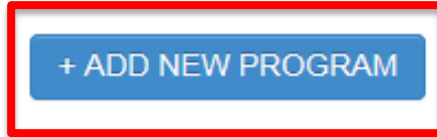
Enhanced program submission process:

- Help feature guides you through the required fields
- Add the program URL allowing for direct access to program information and/or registration
- Select the Principal Knowledge Topic domain
- Provide the program sub-type
- Auto calculation of credit hours for live and self-study programs
- Identify programs for auto renewal next year
- An internal budget code field to help you track your expenses
- Add related documents to your program submission

Conference feature:

- Add conference title, dates, location
- Easily add programs associated with the conference

CFP BOARD

Manage Programs

Click *Add New Program* to submit a General Live or Self-Study program for CFP Board review. Ethics programs, following the Guidelines for CFP Board Ethics courses, can also be submitted online.

+ ADD NEW PROGRAM

New: Pending Payment (1)	Under Review (11)	Active (152)

Title	Initial Save Date	Payment Deadline	Pay
Hasika Test - Conference (5 Apps)	05/11/2017	06/10/2017	☐

Select All   Add To Cart

View Inactive/Archived Programs >

CFP BOARD

Learning Objectives:
> CFP Board will assign each program a unique Program ID

Required

Primary Principle Knowledge Topic:
> Please select
> Education Planning
> Estate Planning
> General Financial Planning Principles
> Investment Planning
> Professional Conduct and Regulation
> Retirement Savings and Income Planning
> Risk Management and Insurance Planning
> Tax Planning

General Financial Planning ▼

Required

Level of Complexity:
Overview ▼
Required

Program Contact:
Please select ▼
Required

Program Budget Code:
1234-5

Method of Delivery:
Live ▼
Required

Live Sub-Type:
> Please select
> Please select
> Stand-alone Workshop or Seminar
> Conference Session
> Live Webinar
> Other
> Current and future years ▼

Conference Session ▼
Required

Program Window:
01/01/2017 - 12/31/2017 ▼
Required

Please indicate program lifecycle.
> Current and future years ▼
> Please select
> Current year only
> Current and future years

Current and future years ▼
Required

This is an Ethics program ☐

This is an Employee-only program ☐

Is this program associated with a conference? ☑

Start Date:
📅
Required

Late fee Assessment

Initial Offering Date: [   ] 📅

Required

Initial Offering Date: [06/06/2017   ] 📅

Required

Because the first occurrence of this program is prior to today's date, a late fee of $100 will be assessed at checkout.

Live Programs – Determining CE Hours

If you are submitting a live program enter the total number of minutes to be considered for the CE hour calculation.

The system will now determine the "Total requested Hours". Live programs must be a minimum of 50 min for 1 CE hour.

Half-hour increments are accepted after the initial one hour of CE has been calculated. This will have an impact on your final program fee. A program determined to be 1.5 CE hours will be assessed at the same rate as that of a 2 credit hour course.

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Is this program Associated with a Conference? If yes, put a check in the box and additional fields of information will appear. Complete this information just once. It will pre-populate for any programs you add as part of this conference.

Is this program associated with a conference? ☑

Start Date: [_____] 📅
Required

End Date: [_____] 📅
Required

Registration URL: [_____]

Conference Name: [_____]
Required

City: [_____]
Required

State: Please select ▼
Required

Check here to add additional sessions for this conference. ☐

Cancel | Save & Add Documentation | Save & Add Another Program | Finish

Is this program associated with a conference? ☐

Start Date: [_____] 📅
Required

End Date: [_____] 📅

Program URL: [_____]

City: [_____]

State: Please select ▼

Please provide the number of minutes of live instruction. [_____]
Required

Total Requested Hours: 0.00
Required

Self-Study Programs – Determining CE Hours

CFP BOARD

The CE calculation for self-study programs (Recorded Webinar, Article Review, eLearning (online) works in a similar manner: add the word count and/or minutes tied to a pilot test and the system will make the final determination of CE hours.
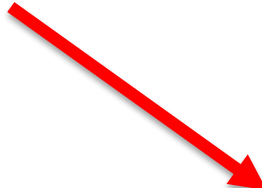
Additional Options

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Provide Instructor/Author Details

Primary Author/Instructor Name:	Hasika
	Required
Second Author/Instructor Name:	
Third Author/Instructor Name:	

Cancel   **Save & Add Documentation**   Save & Add Another Program   Finish

Upload Associated Materials

Please provide the following related to this course:

The following materials may be helpful in the review of the course; **an upload of the Assessment is required:**

- Program Outline: Please provide a detailed timed agenda or program outline.
- Program Materials: Please submit a copy of the program in its entirety: presentation slides, presenter notes, applicable handouts, workbooks, recorded materials, etc.

Assessment: Please submit a copy of the self-study assessment with an answer key. (*Required*)

Browse   Upload Document

Add Another Program   Return to Sponsor Management

Responding to an NMI

Manage Programs

Click *Add New Program* to submit a Live or Self-Study program for General or Ethics CE. General CE Program Requirements, CFP Board Ethics CE Program Requirements, detailed instructions, templates, and videos are available online.

+ ADD NEW PROGRAM

New: Pending Payment (1)   **Under Review (2)**   Active (7)

Invoice #	Program	Type	Ethics?	Total	Latest Payment Date	Status
2381487	Investments for Youth	Live	No	$40.00	06/07/2017	Needs More Information
2373188	Investment Planning	Live	No	$20.00	05/11/2017	Needs More Information

View Inactive/Archived Programs >

Program Detail

Sponsor Name:	BGS Consulting Inc
Program Name:	Investments for Youth
CFP Board Program ID:	235303
Description:	When accepted, CFP Board will assign each program a unique Program ID number that will be used for attendance reporting. The program status will change from Under Review to Active.
Learning Objectives:	When accepted, CFP Board will assign each program a unique Program ID number that will be used for attendance reporting. The program status will change from Under Review to Active.
Primary Principle Knowledge Topic:	Investment Planning
Level of Complexity:	Overview
Program Contact:	Truitt, Joanna

Upload Associated Materials

The following materials may be helpful in our review of the course:

- Program Outline: Please provide a detailed timed agenda or program outline.
- Program Materials: Please submit a copy of the program in its entirety: presentation slides, presenter notes, applicable handouts, workbooks, recorded materials, etc.

Browse   Upload Document

Pay and Submit

CFP BOARD

Manage Programs

Click *Add New Program* to submit a General Live or Self-Study program for CFP Board review. Ethics programs, following the Guidelines for CFP Board Ethics courses, can also be submitted online.

[+ ADD NEW PROGRAM]

New: Pending Payment (3)	Under Review (11)	Active (152)	
Title	**Initial Save Date**	**Payment Deadline**	**Pay**
Hasika Test - Conference (5 Apps)	05/11/2017	06/10/2017	☐
Program Submission Process 2	05/22/2017	06/21/2017	☐
Program Submission Process	05/22/2017	06/21/2017	☑

[Select All] [Add To Cart]

View Inactive/Archived Programs >

Applying Credit

Payment Information

Invoice total:	**20.00**
Total credit available:	**40.00**

Enter the credit amount you wish to apply. Any balance due will require additional payment information.

Credit to apply: [0.00]

[apply credit]

Available credits will update after checkout.

Payment amount: 20.00

Payment method: [Please select ▾]

[Continue]

Continued..

Transaction Details

Cart Subtotal:	80.00
Shipping:	0.00
Discount:	0.00
Cart Total:	**80.00**
Credit to apply:	0.00
Payment amount:	80.00
Balance:	0.00

Payment Information

Payment method:	Visa/MasterCard
Cardholder's name:	Hasika
credit card display:	41**********1111
Expiration date:	2018/08

Order is not complete. Press "Submit Order" to complete.

Edit Payment   Submit Order

Click on the Invoice number for immediate access to a printable receipt

![CFP BOARD]

CONTACT US

http://www.cfp.net

General Questions
mail@cfpboard.org

Renewal Questions
renewal@cfpboard.org

Media Questions
media@cfpboard.org

Contact the Board of Directors
BOD@cfpboard.org

CFP Board
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CFP Board's regular business hours are 8:30 AM to 6:00 PM ET
Monday through Friday.

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https://twitter.com/cfpboard

https://www.youtube.com/user/CFPBoardOfStandards

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