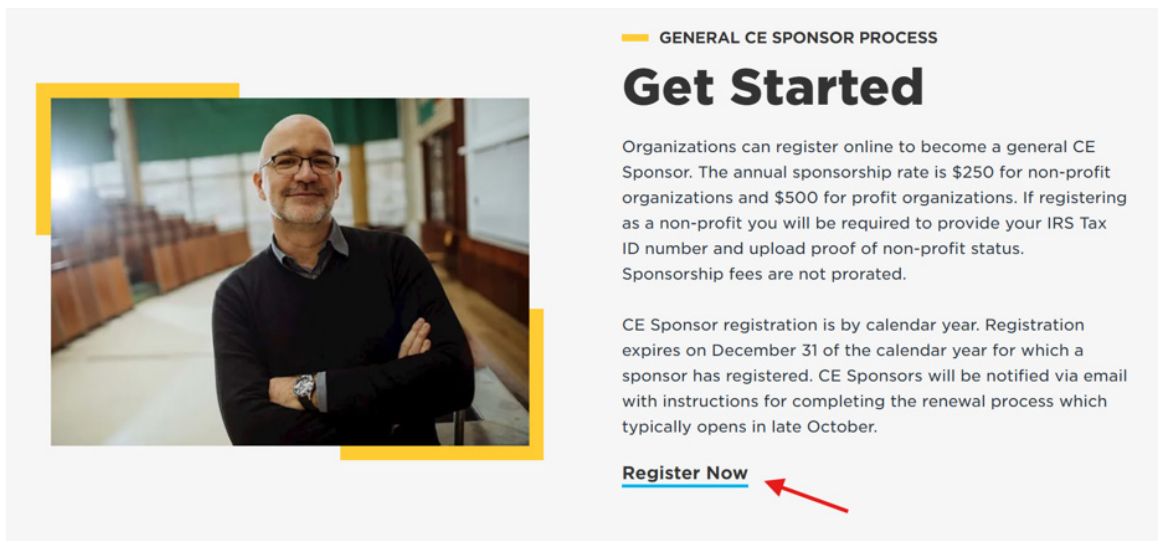


Become a CFP Board CE Sponsor

This guide provides a step-by-step overview of how to become a CE Sponsor, submit CE programs, and report attendance through the CFP Board CE Sponsor Portal. It is designed to help you navigate key processes efficiently and ensure your programs remain compliant and visible to CFP® professionals.

Become a CE Sponsor (One-Time Setup):

1. Go to the “Become a CE Sponsor” webpage and select “Register Now.”



GENERAL CE SPONSOR PROCESS

Get Started

Organizations can register online to become a general CE Sponsor. The annual sponsorship rate is \$250 for non-profit organizations and \$500 for profit organizations. If registering as a non-profit you will be required to provide your IRS Tax ID number and upload proof of non-profit status. Sponsorship fees are not prorated.

CE Sponsor registration is by calendar year. Registration expires on December 31 of the calendar year for which a sponsor has registered. CE Sponsors will be notified via email with instructions for completing the renewal process which typically opens in late October.

[Register Now](#)

2. Select the link to review and download the CE Sponsor Terms & Conditions.

CE Sponsor Application

Welcome to the CE Sponsor Portal.

You are now at the second step in the process. The first step was to read the [Terms & Conditions](#) for a sponsor offering General or Ethics CE. In this step you will register your organization by creating an online account.

Begin the process by typing your organization name in the text box below. If your organization is a current CE Sponsor or has been one in the past, the search results will display when you click *Continue*.

Sponsor Name:

3. Log in to your CFP.net account, or create one, to begin the CE Sponsor application.

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Sponsor Name:

Search Results

Below are the results of the system search. If there is a match or potential match, click *Select*, next to the organization name, to review the information on record. If no match was found, click *Add* to create a new record.

Search Terms: Test Account Ross Adams

Organization	Address
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If no match was found please [Try your Search Again](#) or click *Add* to create a new record.

Didn't find what you were looking for? [Add a new CE Sponsor...](#)

4. Enter your organization's Sponsor information.

Add Sponsor

To continue with the application process, please complete the necessary fields of information requested. If you are applying under a Non-Profit status, you will be required to enter your Tax ID number and upload your 501(c) (3) IRS Determination Letter.

Organization Information

Name: Required

Primary Address Information

Mailing address line 1: Required

Line 2:

Line 3:

City: Required

Postal code: Required

State/Territory: Required

International province:

Country:

Company Information

Company Website URL: Required

Is this organization a non-profit?

I attest that I have read and agree to the CE Sponsor Terms and Conditions for offering General and, if applicable, Ethics CE. Required

- MY CFP BOARD ACCOUNT
 - Sponsor Management Profile
 - Billing Information
 - Sponsor Contact Information
 - Manage Account
 - Personal Profile
 - Tools and Resources
 - Change Sponsors
- NEED HELP? CONTACT US.

5. Confirm your agreement to the CE Sponsor Terms & Conditions.

international province:

Country: **UNITED STATES** ▼

Company Information

Company Website URL:
Required

Is this organization a non-profit?

I attest that I have read and agree to the CE Sponsor Terms and Conditions for offering General and, if applicable, Ethics CE. Required

6. Proceed to check out and submit payment for the annual CE Sponsor membership fee.

[Check-Out](#)

If you have any open credits on your account, you can apply them on the next page during the check-out process.

Line Items

Quantity	Price	Net total	Tax	Shipping	Discount	Paid Amount	Balance Due	Item
1.0000 <small>Required</small>	\$500.00 <small>Required</small>	\$500.00	\$0.00	\$0.00	\$0.00	\$0.00	\$500.00	CE Sponsor - For Profit New

Cart Total

Subtotal: 500.00

Total discount: 0.00

Total tax: 0.00

Total shipping: 0.00

Net Total: 500.00

Total Paid: 0.00

Balance Due: 500.00

Discounts

Enter Promo Code:

Source Code:

Discounts applied:

When checking out, the CE Sponsor may make payment via ACH or credit/debit card.

The screenshot shows the 'Online Store Shopping Cart' checkout page. On the left is a navigation menu with sections for 'MY CFP BOARD ACCOUNT' and 'CE SPONSOR ACCOUNT'. The main content area is titled 'Shopping Cart | Payment' and includes a 'Complete Order' button. The form is divided into three sections: 'Customer Information' (with fields for Customer, Phone, and Email), 'Billing Information' (with fields for Billing contact and Billing address), and 'Payment Information' (showing an invoice total of 15.00 and a payment amount of 15.00, with radio buttons for 'credit/debit' and 'ACH Payments'). A 'Save for future use?' checkbox is at the bottom. A second 'Complete Order' button is located at the bottom right of the form area.

Note: Your CE Sponsor membership must be active before you can submit or renew CE programs.

Submit a CE Program (Per Program Submission):

1. From your CE Sponsor dashboard, select “Add New Program.”

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.

New: Pending Payment (0) Under Review (0) Active (0)

Currently there are no programs that match this status.

[View Inactive/Archived Programs >](#)

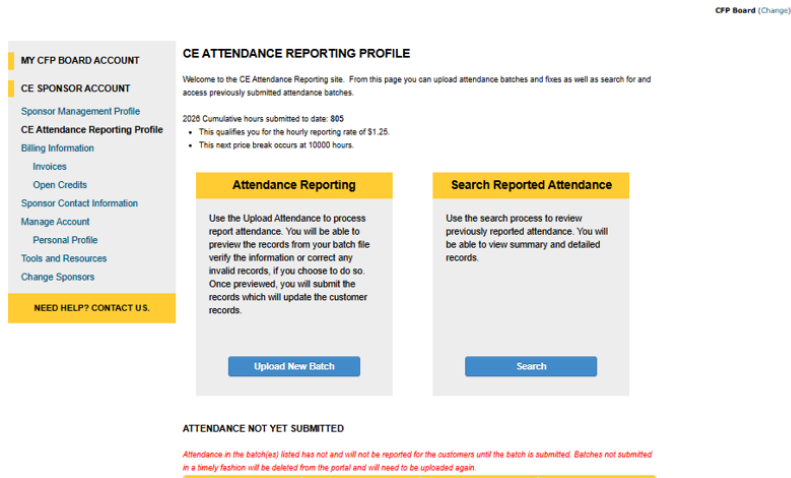
+ ADD NEW PROGRAM

Manage Program Renewals

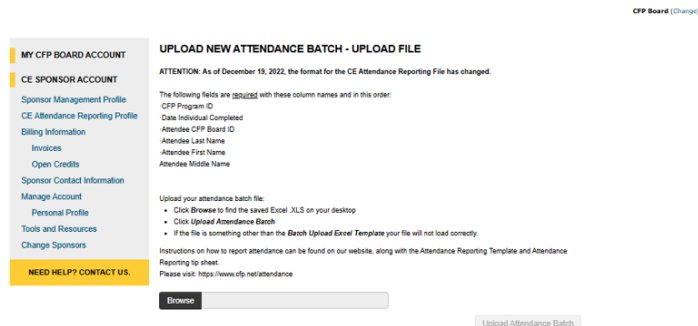
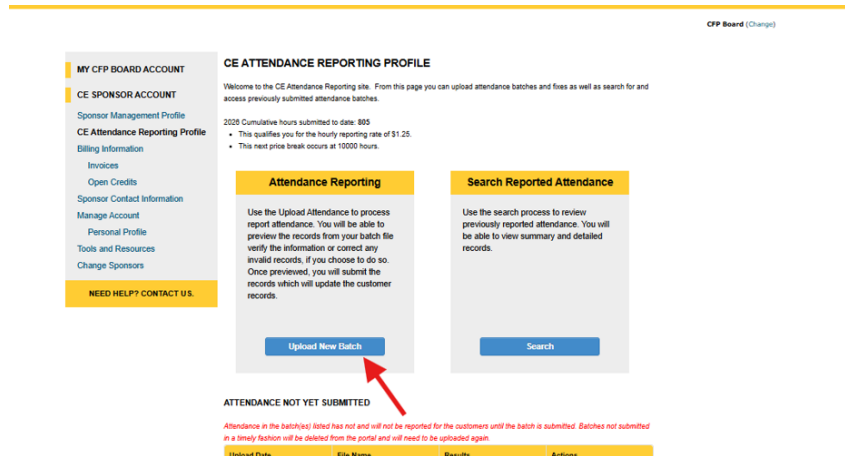
There are no programs to renew at this time.

Report Attendance (Ongoing):

1. Navigate to the “CE Attendance Reporting Profile” within your CE Sponsor Portal.



2. Use the attendance reporting template available on CFP.net, and upload your completed attendance file.



- Review the file for errors, and confirm all records are valid. Once validated, submit the attendance report and complete payment.

CFP Board (Change)

MY CFP BOARD ACCOUNT

CE SPONSOR ACCOUNT

[Sponsor Management Profile](#)

[CE Attendance Reporting Profile](#)

[Billing Information](#)

[Invoices](#)

[Open Credits](#)

[Sponsor Contact Information](#)

[Manage Account](#)

[Personal Profile](#)

[Tools and Resources](#)

[Change Sponsors](#)

NEED HELP? CONTACT US.

ATTENDANCE BATCH UPLOAD - PREVIEW RESULTS

Upload complete. This file has been assigned a unique Batch ID, date-stamped and recorded. Matched files indicate CE hours have been recorded in the Certificant's account. Processing errors indicate no match was found.

Identifying Processing Errors:

- Click on the [Download processing errors details](#) link
- View the error messages now populated in your original excel file
- Fix the errors directly on this spreadsheet
- Click [Upload Fixes](#) to download the corrected file

Note: Corrections can be made at anytime. The [Upload Fixes](#) link is also accessible on the CE Attendance Reporting Profile page.

2026 Cumulative hours submitted to date: 805

- This qualifies you for the hourly reporting rate of \$1.25.
- This next price break occurs at 10000 hours.

UPLOAD SUMMARY

Upload Date: 4/21/2026 12:00:00 AM

File Name: cfp-board-attendance-reporting-template (53).xlsx

[Submit Attendance](#)

Attendance Reporting fees are non-refundable; please ensure your data is correct before you submit.

Total Hours: 13

Total Count: 0

Total Valid: 0

Total Invalid: 13

[Delete Batch](#)

PROGRAMS IN BATCH

CFP Program ID	Program Name	Hours	Initial Offering	Valid Through	Status
348867	October 2025 CE Updates for DEC Members and Hearing Panel Volunteers	195.00	10/01/2025	12/31/2026	Active

UPLOAD DETAILS

Valid Reporting (0) Invalid Reporting Data (13) [Download processing error details](#)

These records do not meet minimum validation requirements. You have the option to correct individual records which, if valid after correction, can be included in the submitted reporting. You may also download the invalid records to correct and then upload separately

Note: Attendance should be reported using the CFP Board template and within the required reporting time frame.

Need Help?

If you have any questions or need assistance, please contact cesponsor@cfpboard.org.