

Notice to CFP® Professionals: Revisions to CFP Board's CE Policies, Effective February 1, 2017

November 1, 2016

CFP Board periodically reviews and updates the policies associated with the CFP® certification requirements. Following a recent review of CFP Board's Continuing Education (CE) policies, CFP Board has adopted revisions to several provisions of its CE policies, which are summarized below. **These revised policies become effective February 1, 2017.**

Questions about CFP Board's CE policies can be directed to our dedicated Stakeholder Services team at 800-487-1497 or ce@cfpboard.org.

Summary of Selected CFP Board CE Policy Changes, Effective February 1, 2017

1. **CE Credit for Designations & Licenses:** CFP Board will grant CE credit hours for coursework completed to *fulfill* the requirements for preparation and/or maintenance of designations and licenses related to the financial planning process. CE credit will *no longer* be granted for passing an exam leading to earning a designation or license.

The number of CE credit hours granted for courses related to designations and licenses will be calculated using the current standards for determining the CE credit hours granted for Live or Self-Study CE programs, as appropriate. Courses related to designations and licenses that are not registered with CFP Board by the sponsor may be reported as a non-registered program online in the *My CFP® Certification* section of an individual's CFP Board account.

2. **Changes to Teaching CE Standards:** CFP Board offers CE credit for specifically-defined teaching activities focused on topics consistent with those in CFP Board's [Principal Knowledge Topics](#). Effective February 1, 2017, CFP Board's teaching standards will be revised to, among other things, define teaching as serving in the capacity of a full-time or adjunct faculty member or instructor responsible for the planning and delivery of courses on financial planning related topics, at an accredited college or university, where instruction is equal to a minimum of 30 hours per quarter/semester. [View the complete revised Teaching Standards >](#)

3. **Changes to Authorship CE Standards:** CFP Board offers CE credit for specifically-defined authorship activities covering subjects consistent with those in CFP Board's [Principal Knowledge Topics](#). Effective February 1, 2017, CFP Board's authorship standards will be revised to, among other things, define authorship as activities directly related to the development of white papers, presentations or other written material that contributes to the financial planning body of knowledge, and require a CFP[®] professional to be a primary or secondary author and listed as a writing contributor in order to be eligible to receive authorship CE credit. [View the complete revised Authorship Standards >](#)
4. **CE Credit for Authors/Instructors of CFP Board-Approved Ethics CE Programs:** CFP Board will consider the 2-hour Ethics CE requirement complete for an author/instructor of a CFP Board-approved Ethics CE program. No additional CE credit hours will be granted for authorship or teaching of a CFP Board-approved Ethics CE program.
5. **Increase in Reporting Fee for Non-Registered CE Programs:** This fee will increase from \$25 to \$40 per non-registered CE program self-reported by an individual CFP[®] professional. CFP[®] professionals do not need to self-report CE credit hours for program completions reported to CFP Board directly by CE Sponsors, and there is no charge for CFP[®] professionals who choose to self-report registered CE programs in advance of the four week time-frame allotted for CE Sponsors to provide CFP Board with program completion records.
6. **Online Self-Reporting of Non-Registered CE Programs:** Faxed and mailed CE reporting will no longer be accepted, and self-reporting of non-registered CE programs will be accepted exclusively through the online form available in the *My CFP[®] Certification* section of an individual's CFP Board account.

Questions?

Contact CFP Board's dedicated Stakeholder Services team at 800-487-1497 or ce@cfpboard.org.