We are pleased to share with you this spring issue of CE Sponsor News designed to keep you informed and engaged with CFP Board. Please plan to join us for our live webinar March 13, when we will go into more detail on the topics covered in this newsletter and take your questions. An archive of newsletters and their corresponding webinars, as well as our distribution and webinar schedule for 2018 are posted on CFP Board’s website, under News for CE Sponsors.

We hope you find these newsletters and webinars informative and helpful. We welcome your feedback or questions at cesponsor@cfpboard.org.

**Webinar: CE Sponsor Update**

Wednesday, March 13, 2018
2:30-3:15 p.m. (Eastern)

Register to Attend

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Learning Objectives Now Available

Learning Objectives (LO’s) for each topic within our Principal Knowledge Topic categories are now available to you online. Use these LO’s as a guide when creating course content or planning a live program. These LO’s were recently reviewed and updated by a group of subject-matter-experts. Click on the category title to access the respective document.

• General Principles of Financial Planning
• Education Planning
• Risk Management and Insurance Planning
• Investment Planning
• Tax Planning
• Retirement Savings and Income Planning
• Estate Planning

Find a CE Program Tool Enhancements Now Live

Enhancements to Find a CE Program online search tool are now live. Using the data now collected with each program submission, the tool includes several additional search features enabling CFP® professionals to find programs that meet their needs and schedule.

Here are the features recently added:
• Access to the CE Sponsors list
• Ability to search by Method of Delivery sub-types, including
  o Workshops/Seminars
  o ReLive or Recorded Webinars
• Conference Sessions
• Article Reviews
• Traditional Courses or Short Courses (0.50 CE hours)
• Expanding program descriptions to include:
  • URL to program description and registration
  • Conference detail: title, start and end dates, and location

CFP Board Ethics CE Program Update

In preparation for the new Ethics CE course, we are asking CE Sponsors interested in facilitating a live program or hosting an online course to attend an informational webinar and register their intent.
Mark your calendars and plan to attend one of these two sessions:

Ethics CE Webinar for Online Providers
Wednesday, March 14, 2018
2:30 – 3:15 p.m. (Eastern)

REGISTRATION TO ATTEND

Ethics CE Webinar for Live Program Providers
Thursday, March 15, 2018
2:30 – 3:15 p.m. (Eastern)

REGISTRATION TO ATTEND

All the information you need to get started is available online. Here are the links:

- Ethics CE Webinar Series for Providers and Instructors
- Instructions for Submitting a Program Request
- Ethics CE Program Requirements
- Resources for Ethics CE Providers

POC Tip - Renewing a Previously Active Program

Need to renew a previously active program? To renew a program outside the renewal period, just send us an email that includes the program title, program ID number and initial offering date for 2018. We will generate a renewal invoice that you can access from your CE Sponsor Portal in the Manage Program Renewal section. Once payment process is complete, notify us via email at cesponsor@cfpboard.org and we will make the program active.

New CE Quality Partner

CFP Board is pleased to welcome College Affordability as our newest CE Quality Partner.
They join an elite group of (now) 21 CE Sponsors who have agreed to a

By-the-Numbers

This is your quarterly snapshot:
comprehensive review of a random selection of their active programs.

If you have an interest in becoming a CE Quality Partner, please send an email to cesponsor@cfpboard.org. Invitations with instructions for initiating the process will be distributed in late March.

Welcome to Our Newest CE Sponsors

**January:**
- Ash Brokerage, LLC
- Brunswick Companies
- Chubb
- Educe Inc
- FSP Pittsburgh Chapter
- FTJ FundChoice, LLC.
- Hawaii Community Foundation
- Ladenburg Thalmann/SAI
- Sierra Pacific Mortgage
- The Federal Savings Bank
- The Futurist Institute
- Whealhealthcare Planning
- Wollman, Gehrke & Associates, P.A.

**February:**
- Chaikin Analytics
- Cleveland Marshall Law Alumni Association
- GraniteShares ETFs
- HoganWillig Attorneys at Law
- IMC COLLEGE
- Lommen Abdo, P.A.
- Mandelbaum Salsburg P.C.
- San Diego Grantmakers
- Sullivan
- The MTM Vault
- Virtu
- HoganWillig Attorneys at Law
- IMC COLLEGE
- Legacy Philanthropy Group
- Mandelbaum Salsburg P.C.
- Signator Investors, Inc.
CFP Board Mailing Lists Available

Does your organization offer a product or service that is beneficial for CFP® professionals or CFP® exam registrants? If so, we want to let you know that CFP Board’s mailing list is available for purchase, to help you get the word out.

Our lists are available in two formats—a full list, or a segmented list (by state or zip code) of all current CFP® professionals or current CFP® exam registrants who have not opted out of third-party communications.

For more information, please email cesponsor@cfpboard.org

Grant Funds Available

Now through April 30, the Foundation for Financial Planning (FFP) is accepting grant applications from great nonprofits to help fund pro bono programs linking financial planners to underserved people in need.

Grant proposals will be accepted until April 30, 2018, via an easy online application. Visit their Grants page for full information and instructions on how to apply. All applications are reviewed by the FFP Grants Committee, made up of independent financial planners and industry leaders. Approved grant applicants will begin to receive funding in January 2019.

Thanks for reading! We will look forward to your participation in the March 13 webinar. If you have any questions, please do not hesitate to email us at cesponsor@cfpboard.org or call (202) 379-2258.