We are pleased to share with you this edition of CE Sponsor Quarterly News designed to keep you informed and engaged with CFP Board. Please plan to join us for our live webinar December 12, 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 is 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 Quarterly Update
Tuesday, December 12, 2017
2:00-2:45 p.m. (Eastern)

Register to Attend

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Identifying Content Gaps
Based on the information now provided with each program submission, CFP Board has a mechanism to begin defining content gaps within the eight Principal Knowledge Topic categories.

We are already seeing a pattern emerge with only four months of data. Of the 4,163 programs submitted since July 20, 2017 – the date you began using the new program submission process – potential gaps have emerged.

If this pattern holds through the first quarter of 2018, we will be asking you to consider creating and/or submitting program content in the areas of Education Planning, Risk Management & Insurance Planning, and Retirement Savings & Income Planning.

Find out more about this project during our webinar on December 12.

“Find a CE Program” Tool Enhancements Go 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. The enhancements will be announced soon to CFP® professionals.

Here is a list of features recently added:
- Access to the CE Sponsors list
- Ability to search by Method of Delivery sub-types, including
  - Workshops/Seminars
  - 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

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2018 CE Sponsorship & Program Renewal

Thank you to all who have completed 2018 renewals. We will continue to send reminders to organizations that have not yet renewed – but please remember that on Monday, January 15, 2018, any sponsorship or program not renewed will become Inactive. The new online process is streamlined and takes only minutes to complete. Program renewals can be completed once the 2018 sponsorship has been paid.

When your sponsorship is renewed, you can begin submitting 2018 programs. Simply select the 1/1/2018 – 12/31/2018 option in the Program Window drop-down.

As a reminder, CFP Board has eliminated the Ethics CE Sponsor category. Sponsor fees remain at the current rate of $500/$250. An active CE sponsorship will be required for an organization to offer a CFP Board Ethics CE program.

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CFP Board Ethics CE Program Update

CFP Board’s Board of Directors recently announced the decision to issue for public comment a second draft of proposed revisions to the Standards of Professional Conduct. The draft will be released in late 2017, and a 30-day comment period will run from January 2, 2018 to February 2, 2018. The Board intends to issue a final Code of Ethics and Standards of Conduct by the end of the first quarter in 2018, with an effective date of January 1, 2019.

Here is how we will proceed with Ethics CE in 2018:

1. Currently approved Ethics courses have been extended through April 30, 2018.
2. The Ethics CE Work Group will continue with curriculum development with the intent to finish the first version of the course by January 31; updates will be made in March after the final standards are ratified.
3. The March 7, 2018 Quarterly CE Sponsor Newsletter will provide these details:
a. Dates for instructor training webinars (two live webinars, with a recorded version available thereafter);
b. Date for a webinar specifically for CE Sponsors planning to build an online course;
c. Approximate distribution date for content;
d. Instructions for submitting your request to offer the new Ethics CE content through the Sponsor Portal.

New CE Quality Partner

CFP Board is pleased to welcome Advisors4Advisors as our newest CE Quality Partner.

They join an elite group of (now) 20 CE Sponsors who have agreed to a comprehensive review of a random selection of their active programs. Selected programs were evaluated using a rubric designed by CFP Board's Council on Education. If you have an interest in becoming a CE Quality Partner, please send an email to cesponsor@cfpboard.org. The 2018 process will begin in March.

By-the-Numbers

This is your quarterly snapshot:

Welcome to Our Newest CE Sponsors
Council on Education Update

CFP Board’s Council on Education met on October 20, 2017. Of particular interest to our CE Sponsors is a recommendation to the Board of Directors to amend the General CE Program Requirements to reduce the minimum required number of final assessment questions for self-study activities/courses from 10 to five questions per CE hour. CE Sponsors will have the discretion to determine the appropriate number of questions on the final assessment, above the minimum, to measure the stated learning outcomes. The Board is expected to consider this recommendation in early 2018.

The Council’s CE & Quality Initiatives work group has completed a document that provides learning objectives, at different levels of complexity, for each of the 72 Principal Knowledge Topics. This document, which will be available online in 2018, will assist CE Sponsors interested in developing and/or submitting content to fill program and course gaps with each of the eight Principal Knowledge Topic domains. Find out more about this project during the December 12 webinar.

The first Council on Education meeting of 2018 is scheduled for January 26.