CE SPONSOR NEWS

We are pleased to share with you this summer issue of CE Sponsor News designed to keep you informed and engaged with CFP Board. Please plan to join us for our live webinar July 17, 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

Tuesday, July 17, 2018
2:30-3:15 p.m. (Eastern)
Register to Attend

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Change in Self-Study Assessment Requirement

The CE team has received substantial feedback from CFP® professionals (many of whom hold multiple professional designations) and CE Sponsors expressing concerns that CFP Board’s current CE Assessment Requirement for self-study programs (10 questions per credit hour) is not aligned with best practices for CE providers or the corresponding requirements for other prominent financial services designations.
In response to this feedback, the Council on Education reevaluated this requirement and recommended a reduction in the required number of assessment questions, reducing it from 10 questions per credit hour to a minimum of five questions per credit hour. With this change, CFP Board will accomplish and encourage the following:

- Align the number of final assessment questions requirement with best practices for adult learning;
- Encourage a focus on measuring learning, by connecting the development of meaningful assessments to a program’s specific learning objectives and level of complexity, potentially beyond the minimum requirement of five questions per credit hour;
- Encourage CE Sponsors to develop and use assessment item banks for their programs, to ensure a variance in assessments among participants; and
- Enhance the experience of CFP® professionals who are serious about learning and staying ahead of trends.

The effective date of this policy change is January 1, 2019.

**Guidance Documents in Development**

The Council on Education’s CE & Quality Work Group is developing a series of documents that support CE Quality Standards for each step in the program development roadmap. These brief summaries provide practical tips and include practical examples. In the series:

- Writing Meaningful Learning Objectives
- Defining Levels of Complexity
- Developing a Learning Plan
- Creating Effective Assessment Questions
- Designing a Program Evaluation

The Program Planning Roadmap and associated guides will be available online in early September.

The Program Planning Roadmap:
CFP Board Ethics CE Program Update

The Board of Directors unanimously approved a new *Code of Ethics and Standards of Conduct* with an effective date of October 1, 2019. The curriculum for the required Ethics CE program, based on the new Code and Standards, will be available to eligible CE Sponsors the week of July 30. All current Ethics programs will be expired September 30, 2018. Delivery of the program using the new content will begin October 1 or earlier if the CE Sponsor is ready.

To be eligible to access the new Ethics content, you will need to register your program following the directions found here.

If you intend to offer Self-Study (Online) Ethics, a representative from your organization must attend this mandatory webinar:

**Criteria Review for Self-Study (Online) Ethics Providers**
Tuesday, August 14, 2018
2:00 – 2:45 p.m. (Eastern)

[REGISTER TO ATTEND](#)

If you intent to offer a Live Ethics program, your designated instructor(s) must meet the established criteria and attend one of these live webinar sessions:

**Ethics CE Instructor Training – Date Options:**

- Thursday, August 16, 2018 2:30 – 3:30 p.m. (Eastern)
• Wednesday, September 12, 2018 2:30 – 3:30 p.m. (Eastern)
• Tuesday, September 25, 2018 2:30 – 3:30 p.m. (Eastern)

Registration links for these webinars will be posted here the week of July 23, and we will send you an email about the availability of webinar registration. Additional webinar sessions will be added as needed.

Please review additional updated information about Ethics CE 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

Welcome to Our Newest Sponsors (April - June)

• 1st ASAP Continuing Education
• 65 Incorporated (DBA i65)
• AdvisorServe
• Baker Donelson
• Berry College
• BPAS
• Capital Preferences, Ltd.
• CFA Society New Mexico
• CIBC Private Wealth Advisors, Inc.
• Colva Insurance Services
• Cryptocurrency Consulting
• DPL Financial Partners
• Egerton McAfee Armistead & Davis, P.C.
• Gordon Fischer Law Firm
• In Marriage QDRO
• Jewish Federation of Greater Dallas
• Just Invest LLC
• KraneShares
• Law Offices of Steve Weisman
• Lawyers with Purpose
• New Heights Consulting
• PlanPlus Global
• Sentara RMH Medical Center
• Sontag Advisory
• Stira Capital
• Utah Planned Giving Roundtable

By-The-Numbers
Thanks for reading! We will look forward to your participation in the July 17 webinar. If you have any questions, please do not hesitate to email us at cesponsor@cfpboard.org or call (202) 379-2258.