

Insurance Continuing Education Courses for CFP® Certification

The following Insurance Continuing Education courses are approved for CFP® Certification renewal*

* Course approvals subject to change

Updated 2/6/17

Course Name	Delivery Method	LicenseType	Approved Hours
401(k) Plans, 6th Edition	Self-Study	General	4
Advance Planning for Senior Needs, 4th Edition	Self-Study	General	5
Advising Clients on Medicare, 2nd Edition	Self-Study	General	2
AML Best Practices for the Life Insurance Industry, 2nd Edition	Self-Study	General	1.5
AML Training Program for Life Insurance Agents	Self-Study	General	1
Annuities for Today's Investor, 1st Edition, 3rd Revision	Self-Study	General	3
Annuity Concepts, 2nd Edition, Revised	Self-Study	General	3
Annuity Suitability and Disclosure	Self-Study	General	4
Annuity Suitability: 4-Hour Training Course, 2nd Edition	Self-Study	General	3
Annuity Training Course - NAIC/FINRA Rules and Regulations	Self-Study	General	5.5
Anti-Money Laundering Guidelines for Insurers	Self-Study	General	1
Anti-Money Laundering Laws and Practices	Self-Study	General	2.5
Anti-Money Laundering Programs for Life Insurance Companies, 1st Edition	Self-Study	General	1.5
Anti-Money Laundering Rules for Insurance Companies	Self-Study	General	1
Anti-Money Laundering Standards for the Insurance Industry	Self-Study	General	2
Anti-Money Laundering Training for Insurance Professionals	Self-Study	General	2
Asset Allocation in Variable Annuities, 2nd Edition	Self-Study	General	1
Asset Allocation, 1st Edition Revised	Self-Study	General	2
Business Continuation Training Course, 3rd Edition	Self-Study	General	5
Business Insurance Concepts, 10th Edition	Self-Study	General	5
California 8-Hour Annuity Training Course, 3rd Edition	Self-Study	General	5
California 8-Hour Long-Term Care Training Course, 2nd Edition	Self-Study	General	5
California 8-Hour Mandatory Long-Term Care Course	Self-Study	General	4.5
Disability Income Insurance, 3rd Edition	Self-Study	General	5
Distribution Planning: Required Distributions, 2nd Edition	Self-Study	General	1
Equity-Indexed Annuities, 3rd Edition	Self-Study	General	2
Estate Planning Concepts, 12th Edition	Self-Study	General	5
Ethical Insurance Producer	Self-Study	General	3
Ethical Practices, 2nd Edition Revised	Self-Study	General	4
Ethics, 3rd Edition	Self-Study	General	3
Ethics at Work	Self-Study	General	2
Ethics for the Insurance Professional, 4th Edition	Self-Study	General	3
Financial Challenges Facing Retirees, 4th Edition	Self-Study	General	2.5
Financial Planning Process, 9th Edition	Self-Study	General	5
Financial Products Training Course, 6th Edition	Self-Study	General	5
FINRA Rule 2330: Deferred Variable Annuities	Self-Study	General	1
Group Insurance, 7th Edition	Self-Study	General	4
Health Care Reform, 2nd Edition	Self-Study	General	1.5
Health Concepts, 20th Edition	Self-Study	General	5
Health Insurance Fundamentals	Self-Study	General	5
Health Savings Accounts, 2nd Edition	Self-Study	General	4
Idaho Annuity 4-Hour Training Course	Self-Study	General	4
ILITs and Estate Planning, 2nd Edition	Self-Study	General	1.5
Indexed Products	Self-Study	General	5
Indexed Products, 1st Edition (Florida)	Self-Study	General	5
Indiana Long-Term Care and Partnership Program 5-Hour Refresher Course	Self-Study	General	4
Insurance Ethics and Consumer Protection	Self-Study	General	1
Introduction to Advanced Markets, 4th Edition	Self-Study	General	5
Introduction to Life Insurance, 2nd Edition, 3rd Revision	Self-Study	General	5
Introduction to Trusts: Case Studies, 2nd Edition	Self-Study	General	1.5

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Investing Retirement Assets, 3rd Edition	Self-Study	General	2
Life Concepts, 18th Edition Revised	Self-Study	General	7
Life Insurance in Action	Self-Study	General	1
Life Insurance Policy Comparison and Underwriting, 2nd Edition	Self-Study	General	5
Long-Term Care and Partnership Program 4-Hour Refresher Course, 2nd Edition	Self-Study	General	3.5
Long-Term Care and Partnership Programs Initial 8-Hour Course, 2nd Edition, Revised	Self-Study	General	5
Long-Term Care Concepts	Self-Study	General	2
Long-Term Care Coverage Combined with Annuities and Life Insurance	Self-Study	General	3.5
Long-Term Care Suitability, 2nd Edition	Self-Study	General	4
Long-Term Care, 6th Edition	Self-Study	General	5
MA Eligibility and the Long-Term Care Partnership Program: Initial Course, 2nd Edition	Self-Study	General	5
MA Eligibility and the Long-Term Care Partnership Program: Refresher Course	Self-Study	General	4
Massachusetts Long-Term Care Training: Initial Course	Self-Study	General	5
Medicare and Medigap Insurance, 9th Edition	Self-Study	General	4
Medicare and Medigap Insurance, 10th Edition	Self-Study	General	4
Medicare, 2nd Edition	Self-Study	General	2
Medicare, 3rd Edition	Self-Study	General	2
Needs Analysis, 4th Edition	Self-Study	General	5
Principles of Retirement Planning, 6th Edition	Self-Study	General	5
Problematic Beneficiary Designations, 2nd Edition	Self-Study	General	4
Qualified and Nonqualified Plans, 4th Edition	Self-Study	General	5
Retirement Income Strategies	Self-Study	General	1
Section 529 Plans, 2nd Edition	Self-Study	General	3
Senior Needs Planning, 5th Edition	Self-Study	General	5
Social Security and Medicare, 4th Edition	Self-Study	General	5
South Dakota Long-Term Care Medicaid Training: 1-Hour Course	Self-Study	General	1
Suitability for Annuities, 4th Edition	Self-Study	General	1
Suitability For Traditional Life And UL Insurance	Self-Study	General	2
Taxation of Life Insurance and Annuities, 2nd Edition	Self-Study	General	2
Texas Long-Term Care and Partnership Policies: Initial Course, 2nd Edition	Self-Study	General	5
The DOL Fiduciary Rule: Its Impact on Insurance Agents	Self-Study	General	2
Understanding 1035 Exchanges	Self-Study	General	1.5
Understanding IRAs, 4th Edition	Self-Study	General	5
Understanding Wills and Intestacy, 2nd Edition	Self-Study	General	2
Variable Contracts, 2nd Edition Revised	Self-Study	General	5
Variable Contracts: Case Studies, 1st Edition Revised	Self-Study	General	3
Wells Fargo Annuity Course	Self-Study	General	4
Wells Fargo Annuity Training Course	Self-Study	General	4
Wells Fargo Annuity Training Course (Wisconsin)	Self-Study	General	4
2017 Tax Update	Classroom	General	8
Annuity Suitability and Disclosure, 2nd Edition	Classroom	General	4
Behavioral Finance I: Why Good People Make Bad Investment Decisions	Classroom	General	4
Behavioral Finance II: Overcoming the Obstacles to Investment Success	Classroom	General	4
Beneficiary Designations - Getting it Right	Classroom	General	4
Beneficiary Designations II: The Devil's in the Details, 1st Edition, Revised	Classroom	General	4
Beneficiary Designations-Treasure Chest or Time Bomb?, 1st Edition, Revised	Classroom	General	4
Buying Within Your Budget	Classroom	General	4
Countdown to Retirement, 2nd Edition	Classroom	General	8
CSI Minnesota: Credit Score Investigation	Classroom	General	8
Different Strokes for Different Folks	Classroom	General	8

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Estate Planning from A to Z	Classroom	General	8
Estate Planning Techniques, 1st Edition, Revised	Classroom	General	4
Ethics for Insurance Professionals: A Practical Guide	Classroom	General	3
Financial Planning Cornerstones, 2nd Edition Revised	Classroom	General	8
Financial Strategies to Achieve Client Objectives, 2nd Edition, Revised	Classroom	General	4
Life Insurance and Annuities: The Effects of Income and Estate Taxation	Classroom	General	4
Managing Assets and Income in Retirement	Classroom	General	4
Managing Investment Portfolios: Asset Allocation and Other Techniques	Classroom	General	8
Planning for Post-Retirement	Classroom	General	2
Real Estate Hangover: 4 Steps to Recovery	Classroom	General	4
Retirement Planning Strategies, 1st Edition, Revised	Classroom	General	4
Social Security: Now...and the Future? 2nd Edition, Revised	Classroom	General	4
Strategic Default and the Path Back	Classroom	General	8
Tackling Eldercare Issues	Classroom	General	1
Tax Aspects of Homeownership	Classroom	General	4
Tax Traps in Life Insurance and Annuities, 1st Edition, Revised	Classroom	General	4
Tax Write-Offs for the Self-Employed, 2nd Edition, Revised	Classroom	General	8
The New World of Annuities: Where They've Been and Where They're Going	Classroom	General	4
The Tax Impact of Residential Real Estate Investments	Classroom	General	4
To Fall and Rise Again: Life After Financial Crisis	Classroom	General	8
Understanding Eldercare Financing Options	Classroom	General	4
Understanding Indexed Annuity and Life Insurance Contracts	Classroom	General	4
Understanding IRAs - Products, Distributions, and Strategies	Classroom	General	4
Using Reverse Mortgage as a Proactive Financial Planning Tool	Classroom	General	4
We're in Probate—Now What?	Classroom	General	4
Wills and Estates of the Rich and Famous	Classroom	General	4