

Continuing Education Program Application

SECTION I: Contact Information

CE Sponsor ID#: _____

Contact Name: _____

CE Sponsor Name: _____

Contact Telephone: _____

CE Sponsor Web site: _____

Contact e-mail: _____

CE Sponsor Address: _____

This information includes a new Sponsor Contact or updated information.

SECTION II: Submitting a Program

- 1) For each program you are submitting, provide the required information on the second page of this application. If you need to submit more than seven programs, photocopy the second page prior to filling out.
- 2) Attach a brief description, including agenda and time frames, for each program. Do not send handouts or workbooks unless it clarifies your submissions.
- 3) To complete the topic hours requested, use the following subject codes:
 - A. General Principles of Financial Planning
 - B. Insurance Planning and Risk Management
 - C. Employee Benefits Planning
 - D. Investment Planning
 - E. Income Tax Planning
 - F. Retirement Planning
 - G. Estate Planning

A complete list of topics under these subjects can be found in CFP Board's *CFP® Certification: Policies, Renewal Requirements and Continuing Education Standards* publication. If a program addresses more than one subject, please divide hours between each subject and provide total hours requested for that program.

SECTION III: CE Program Review Fee

The CE program review fee is charged based on the number of hours for the program.

For Profit Program Hourly Fee: \$25 per program hour

Nonprofit Program Hourly Fee: \$10 per program hour

Please select method of payment:

Check Check Number: _____

VISA MasterCard American Express

Name on Credit Card: _____

Card #: _____

Cardholder Signature: _____

Expiration Date: _____

SECTION IV: Terms and Conditions

We agree to comply with the terms and conditions of CFP Board's Continuing Education Sponsor Registration Agreement, as amended from time to time.

By submitting educational program(s) for acceptance by CFP Board for continuing education (CE) credit, we agree that CFP Board has not waived any of the rights it may have to pursue claims of trademark infringement or dilution. The acceptance of such program(s) by CFP Board does not constitute an endorsement of the program(s) or of any certificate or designation that is conferred as a result thereof.

CE Sponsor Name: _____

Contact Name (please print): _____

Contact Signature: _____ Date: _____



