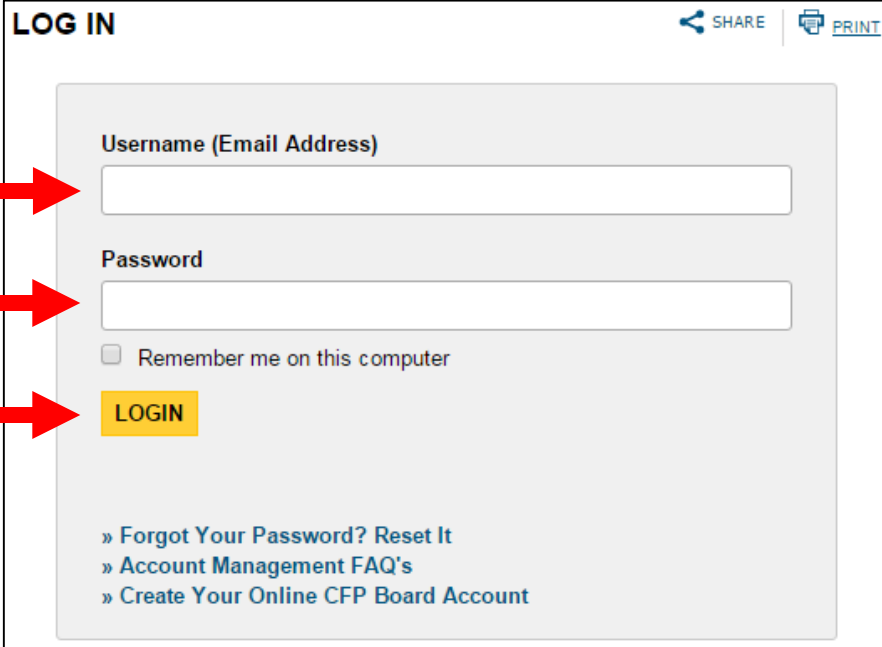


# Continuing Education Self-Reporting Guide

# Access 'My CFP Board Account'

- Go to [www.CFP.net/log-in](http://www.CFP.net/log-in)
- Enter the Username & Password and select '**LOGIN**'



**LOG IN** [SHARE](#) [PRINT](#)

Username (Email Address)

Password

Remember me on this computer

**LOGIN**

» [Forgot Your Password? Reset It](#)  
» [Account Management FAQ's](#)  
» [Create Your Online CFP Board Account](#)

# Access 'My CFP® Certification'

- In the left-hand navigation, select **'My CFP® Certification'**



# Access the CE Summary

## ■ Select 'View / Report CE'

### MY CFP® CERTIFICATION!

From this section of the Web site, you will be able to manage and track your CFP® certification. You can report continuing education (CE) credits throughout your CE period, review information about your certification and even renew your certification online.

#### » YOUR PROFILE

Full Name:	
CFP Board ID Number:	
Your next Annual Certification Fee Payment is due:	
Your next Continuing Education Reporting Deadline is:	
Your current CFP® certification status is:	

#### » CONTINUING EDUCATION (CE) SUMMARY

The following is a snapshot of your current CE reporting period, including the CE hours that have been accepted to date. Click the "View/Report CE" button to view the status of CE already reported and to report additional CE for this period.

CE Period	CE Required	CE Accepted	CE Balance
			<a href="#">View / Report CE</a>

# Access the Self-Reporting Form

## ■ Select 'Report CE'

### CONTINUING EDUCATION (CE) SUMMARY & REVIEW

Below are the CE hours that have been reported to CFP Board as of [REDACTED]. Please review this list to verify that the information is correct. The status indicates which programs were accepted, which were denied, which are pending review by CFP Board, which have had additional information requested, and which were not reviewed because the CE requirement has already been met. If you have new CE hours to report, click the "Report CE" button.

#### » MY CE PROFILE

CFP® certificants must complete the required number of CE hours each reporting period, including 2 hours from a CFP Board-approved program on CFP Board's *Ethics Professional and Responsibility (Ethics)* and/or *Financial Planning Practice Standards (Practice Standards)*.

#### Current CE Period:

Total CE Hours Required:	[REDACTED]
Total CE Hours Accepted:	[REDACTED]
Balance of CE Hours Remaining:	[REDACTED]
Hours Pending Review:	[REDACTED]
Ethics/Practice Standards CE Requirement Met:	[REDACTED]

  Report CE

# Self-Reporting Registered CE Programs

# Option One:

- Search by 'CFP Board Program ID'

**REPORT CONTINUING EDUCATION**

Please use the following options to report CFP Board registered CE Programs.


**SEARCH PROGRAMS**

CFP Board Program ID:

CE Sponsor Name:

Limit my search to CFP Board Ethics Programs

**SEARCH** **RESET**



# Option Two

## ■ Search By 'CE Sponsor Name'

**REPORT CONTINUING EDUCATION**

Please use the following options to report CFP Board registered CE Programs.

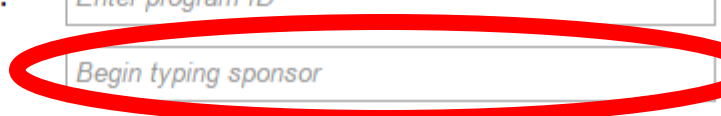
**SEARCH PROGRAMS**

CFP Board Program ID:

CE Sponsor Name:

Limit my search to CFP Board Ethics Programs

**SEARCH** **RESET**





# Option Two: Search by Sponsor

- **Please Note:** Sponsor's CE Program listing is based on programs active within the CFP® Professional's CE Reporting Period

**REPORT CONTINUING EDUCATION**

The CE Programs listed below meet your search criteria.

**Search Criteria**

Sponsor Name:

Narrow by Program Name:  **GO >**

---

1 | 2 | 3 | 4 | 5 | 6 | 7 | 8

Program Name ▲	Program ID	Hours	Method	Sponsor
<input type="text"/>	<input type="text"/>	2.00	Live	<input type="text"/>
<input type="text"/>	<input type="text"/>	2.00	Live	<input type="text"/>
<input type="text"/>	<input type="text"/>	1.00	Live	<input type="text"/>

# Option Three

## ■ Search by 'Ethics Programs'

**REPORT CONTINUING EDUCATION**

Please use the following options to report CFP Board registered CE Programs.

**SEARCH PROGRAMS**

CFP Board Program ID:

CE Sponsor Name:

Limit my search to CFP Board Ethics Programs



# Program Selection

## ■ Enter 'Date Completed' and Affirmation

» **REPORT CONTINUING EDUCATION**

Please verify the following information for the program you are reporting. Clicking the "Report CE" button will add the program to the list of programs for your CE reporting period.

**CE Sponsor Information**

CE Sponsor Name:

CE Sponsor ID No:

**Program Information**

Program Name:

Total Hours:

Ethics Program?

Method of Delivery:

CFP Board Program ID:

**Date Completed (Required)**

Enter the date you completed this program as mm/dd/yyyy:

I affirm that this submission is true, accurate and complete to the best of my knowledge. I understand that CFP Board has the right to audit this CE Program and I agree to provide CFP Board with further information and/or documents regarding this program upon request.

**REPORT CE**

# Self-Reporting

## Non-Registered CE Programs

# Enter Search Information

- Enter '**CE Sponsor Name**' and select '**SEARCH**'
- If organization is not a CE Sponsor or does not have active CE Programs, select '**Limit my search to CFP Board Ethics Programs**' and select '**SEARCH**'

### REPORT CONTINUING EDUCATION

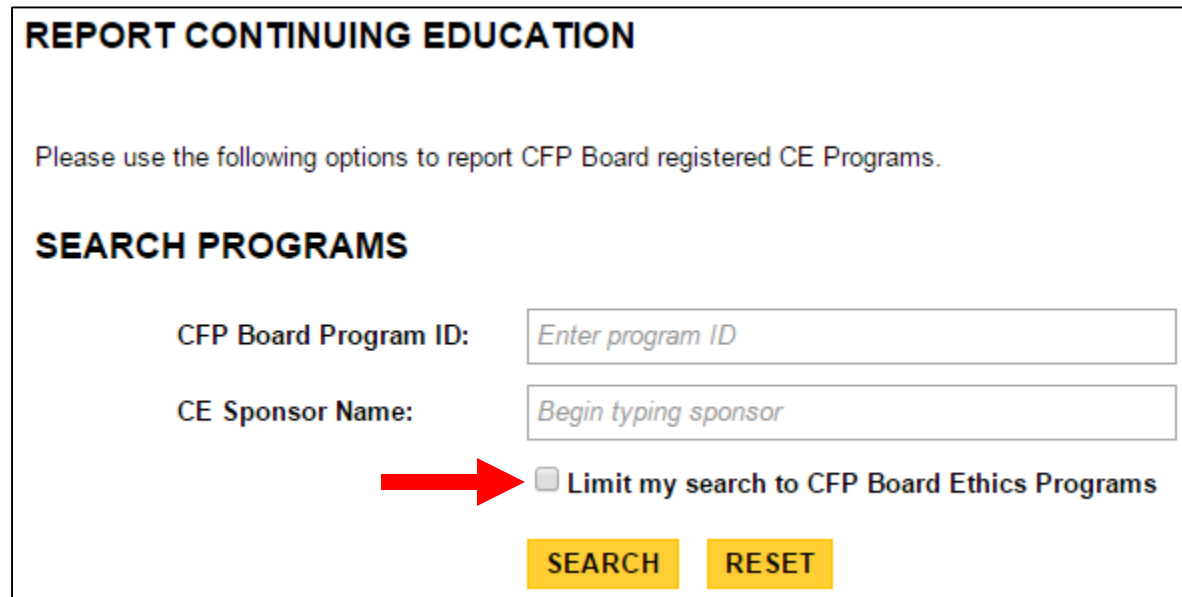
Please use the following options to report CFP Board registered CE Programs.

#### SEARCH PROGRAMS

CFP Board Program ID:

CE Sponsor Name:

Limit my search to CFP Board Ethics Programs



# Report Non-Registered CE Program

- Scroll to the bottom of the results
- Select 'Report non-registered CE program (\$25 fee)'

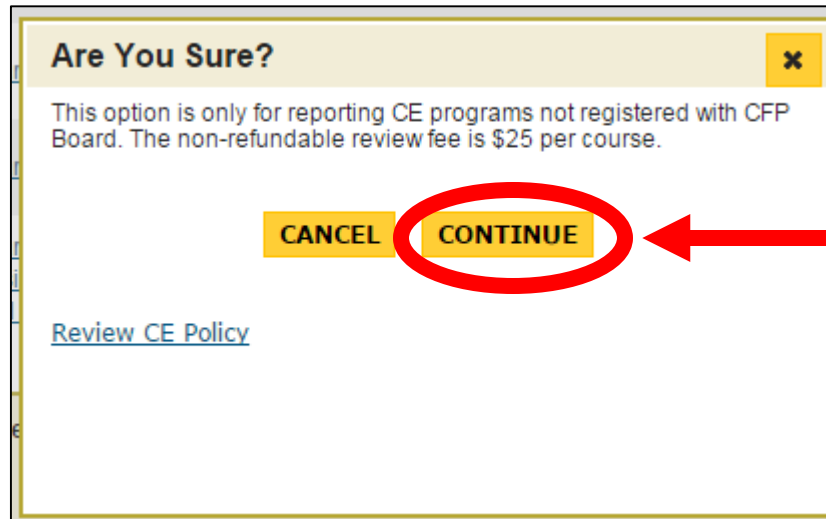
Don't see your program?

NEW SEARCH

[Report non-registered CE program \(\\$25 fee\) >](#)

# Confirmation

- Select 'CONTINUE'



# Enter Program Information

- Complete all fields and select 'REPORT CE'

» **REPORT CONTINUING EDUCATION**

Please complete the below form to report non-registered Continuing Education courses to CFP Board for review. CFP Board will review the information and contact you via email with a status. Non-registered CE programs are reviewed based on CFP Board's current [CE standards](#).

**CE Sponsor Information (Required)**

CE Sponsor Name:

**Program Information (Required)**

Program Name:

Method of Delivery:

**Hours Granted (Required)**

Please enter in the total hours of CE requested for this course.

General:

**Date Completed (Required)**

Enter the date you completed this program as mm/dd/yyyy:

I affirm that this submission is true, accurate and complete to the best of my knowledge. I understand that CFP Board has the right to audit this CE Program and I agree to provide CFP Board with further information and/or documents regarding this program upon request.

**REPORT CE**

**Don't want to report manually?**

[Start a New Search](#) - If you do not want to report your CE manually, you can return to the CE Sponsor look up page.