AICPA & CIMA

Worldwide leaders in public and management accounting

2022 AICPA & CIMA ENGAGE Approved CFP Credits

Session Title	CFP ID	CE Hours Offered
ENG2205. Contributing to an HSA Beyond Age 65 - Navigating Medicare's Rules	301271	1.5
ENG2210. 2022 IRA and Retirement Planning Update	301306	1.5
ENG2211. Peer Review Update	301299	1.5
ENG2212. Driving Value from ESG Reporting	301239	1.5
ENG2213. Your Tax Prep Questions Answered: 706, 709, 1041	301272	1.5
ENG2214. Student Loans	301270	1.5
ENG2215. Investing in Crypto and the Current State of the Blockchain Ecosystem	301258	1.5
ENG2217. Estate Planning for Non-Taxable Estates 10M and Less	301307	1.5
ENG2219. An Army of One - How Power BI and Modern Excel Give You Financial Superpowers	301261	1.5
ENG2220. Interactive Case Study: UHNW Estate Planning	301302	1.5
ENG2221. Tools and Trends in Philanthropic Planning: DAFs, Impact Investing and More	301296	1.5
ENG2222. Quality Management	301252	1.5
ENG2224. Combatting the Great Resignation and its Effects on Women in the Workplace	301297	1.5
ENG22TH. AICPA Town Hall	301254	1.0
EST2202. Community Property Basics for Accountants and other Planners	301340	1.0
EST2203. Engaging the Next Generation in the Estate Plan	301269	1.0
EST2204. Legislation and Regulation Updates	301295	1.5
EST2205. Inbound Tax Planning	301238	1.5
EST2206. The Exemption from the Generation-Skipping Transfer Tax: The Basics and Beyond	301294	1.5
EST2207. Grantor Trust Planning	301267	1.5
EST2208. Workshop: All Things Roth	301273	1.5
EST2209. Planning for Closely-held Businesses	301268	1.5
EST2210. NIMCRUT Basics – When and How to Use the Net-Income with Make-up Charitable Remainder Unitrust	301311	1.5
EST2211. Making Changes to Irrevocable Trusts	301263	1.5
EST2213. AICPA Trust, Estate, and Gift Tax Technical Resource Panel Update	301265	1.5
EST2214. IRS Update and Dialogue on Estate and Gift Taxes - Form 706 and 709	301255	1.5
PFP2201. Keynote - Economist | preceded by the PFP Standing Ovation Awards	301333	1.5
PFP2202. Managing Long Term Care Risk with Hybrid Long-Term Insurance Contracts	301170	1.0
PFP2203. Succession Planning Case Studies	301266	1.5
PFP2205. Gutters & Guardrails: Maximizing Retirement Income with Spending Flexibility	301264	1.5
PFP2207. How Alternative Investments Can Be Incorporated Into Your Financial Planning Practice	301232	1.5
PFP2208. What To Do When a Strategy Performs Poorly	301201	1.5
PFP2209. Low Cost/No Cost Automated Tracking and Insights to Better Serve Clients	301247	1.5
PFP2215. Investment Best Ideas Panel	301233	1.5
PFP2218. Healthcare Planning for Early Retirement	301346	1.5
PFP2219. Best Planning Ideas Panel | preceded by the PFP Distinguished Award Presentation	301260	1.5
PFP2220. Personal High Net Worth Property & Casualty Insurance: Lessons Learned From Recent Catastrophic Events	301274	1.5
PFP2222. Social Security with Medicare	301301	1.5
TAX2202. 1031 Exchanges	301312	1.5
TAX2203. Identifying Tax Traps and Financing Nuances for Families Caring for Children with Special Needs	301279	1.5
TAX2204. Federal Tax Policy Update: Politics, Proposals and Prospects	301314	1.5

Session Title	CFP ID	CE Hours Offered
TAX2206. A Conversation About IRS Audits of High Wealth Individuals and their Related Entities	301248	1.5
TAX2207. Global Investing and Information Reporting for High Net Worth Individuals	301313	1.5
TAX2208. Ethical Dilemmas in Representation	301305	1.5
TAX2209. Individual Tax Update	301303	1.5
TAX2210. Demistyfying Distributable Net Income	301257	1.5
TAX2211. Partnership Tax Update	301298	1.5
TAX2214. Real Estate Tax: Taxation of Real Estate Professionals	301262	1.0
TAX2215. Best Tax Ideas Panel	301304	1.0
TAX2216. The surprising state tax consequences triggered by employees who work from home	301293	1.5