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Advanced Planning

Title	Presenter(s)	The American College CE	CFP Board General CE
Using Trusts as IRA Beneficiaries in a Post-SECURE-Act World	Jeffrey Levine, CPA/PFS, CFP®, ChFC®, RICP®, CWS®, BFA®, MSA	1.0	1.0
Advanced Considerations when Navigating Crypto in Financial Planning	Tyrone V. Ross, Jr.	1.0	1.0
Five Unique Planning Considerations for Aging Parents of Disabled Children	Joellen Meckley, JD, MHS, ChSNC®	1.0	1.0
New Horizons in Estate Planning	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
When Life Throws a Curveball: Planning Essentials for Clients Impacted by Disability	Joellen Meckley, JD, MHS, ChSNC®	1.0	1.0
Convert More Prospects with a Simplified Scalable Approach	Jason L. Smith, CEP®, BPC	1.0	1.0
Buying U.S. Property for U.S. Non-Citizens	Chia-Li Chien, PhD, CFP®, PMP®, CPBC	1.0	1.0
Navigating Financial Complexity and Estate Planning in Blended Families	Mikel Van Cleve, MBA, CFP®, FBS®, CEBS	1.0	1.0
Divorce and the Special Needs Family: Legal and Financial Challenges for the Modern Advisor	Scott Suzuki, Esq and Carolyn Humphrey	1.0	1.0
Fixing a Flawed Estate Plan: Protecting Special Needs Beneficiaries	Ethan Ordog, JD	1.0	1.0
Critical Legislative Changes Impacting Disability and Special Needs Planning	Roxanne Chang, JD, Beth Manes, JD, Brian Lindberg and Victoria Sulerzyski, JD	1.0	1.0
Master Inherited IRAs and Beneficiary Distribution Rules	Denise Appleby MJ, APA, AKS, CISP, CRC, CRPS, CRSP	1.0	1.0

Practice Management

Title	Presenter(s)	The American College CE	CFP Board General CE
Revolutionizing Financial Planning with ChatGPT: A Collaborative Approach between Technology and Human Expertise	Eric Ludwig, PhD, CFP®. RICP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF®	1.0	1.0
Foundations of Digital Marketing for Financial Advisors	Intention.ly	1.0	N/A
Content Creation and Outreach	Intention.ly	1.0	N/A
Client Engagement and Retention	Intention.ly	0.9	N/A
Advanced Digital Marketing Strategies	Intention.ly	0.8	N/A
How to Communicate with Impact and Influence	Deirdre Van Nest	1.0	N/A
Are You Capitalizing on the SEC Marketing Rule?	Matt Seitz	1.0	1.0

Insurance & Risk Management

Title	Presenter(s)	The American College CE	CFP Board General CE
The Value of Permanent Life Insurance in Wealth Management	Michael Finke, PHD, CFP® and Ragiv Rebello	1.0	1.0
Key Person and Corporate Owned Life Insurance Planning	Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP®	1.0	1.0
From Policy to Practice: LTC Insurance Trends and Planning Strategies When Benefits Are Used	Kaylee Ranck, PhD, Joellen Meckley, JD, MHS, ChSNC®, and James Karthaus, MA, CFP®, CLU®, ChFC®	1.0	1.0
Life Insurance and Changing Demographics for Women	Sophia Duffy, JD, CPA	1.0	1.0
Fiduciary Insights, Mitigating Risks: GUL vs. VUL	James Karthaus, CFP®, CLU®, ChFC®, MA	2.0	2.0
New Uses of Life Insurance in Retirement Planning	Steve Parrish, JD,AEP®,ChFC®,CLU®,RICP®, Peter Richardson, JD, CFP® and Andrew Weber, CFP®, CLU®, AEP®, RICP®, WMCP®	1.0	1.0
Life Insurance in a Changed Planning Environment	Steve Parrish, JD, AEP®, ChFC®, CLU®, RICP® and Paul Wetmore MBA, LUTCF®, CLU®, FSCP®	1.0	1.0

Ethics in Financial Planning

Title	Presenter(s)	The American College CE	CFP Board General CE
AI Ethics in Financial Services: Ethical Considerations of ChatGPT*	Azish Filabi, JD, MA, Eric Ludwig, PhD, CFP®, RICP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF®	1.0*	1.0
Trust in Financial Services*	Azish Filabi, JD, MA, Domarina Oshana, PhD, Katherina G. Pattit, PhD, and Jason M. Pattit, PhD	1.0*	1.0
Navigating Ethics and Regulation of AI*	Azish Filabi, JD, MA	1.0*	1.0
Ethics for the Financial Services Professional	Azish Filabi, JD, MA	1.5	1.5

*These courses meet The College's Professional Recertification Program (PRP) ethics CE requirements, but do not satisfy CFP Board ethics CE requirements. However, CE 126, which is CFP Board Approved Ethics CE is included with PRP membership or a subscription to Knowledge Hub+. Once enrolled in either, CE 126 can be found in My Learning Hub.

Retirement Planning

Title	Presenter(s)	The American College CE	CFP Board General CE
Drive Growth and Deeper Client Relationships with the Retirement Income Style Awareness	Wade Pfau, PhD, CFA, RICP® and Alex Murguia, PhD	2.0	2.0
A Goals-Based Approach to Retirement Income Planning	Michael Finke, PHD, CFP®	1.0	1.0
Estimating the True Cost of Retirement	David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Redefining the Optimal Retirement Income Strategy	David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Snowbirding: Living in More Than One Location in Retirement	Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP®	1.0	1.0
The Retirement Planning Issue No One Wants to Discuss: Diminished Decision-Making Capacity	Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP®	1.0	1.0
Maximizing Retirement Success: Beyond Assets and Liabilities	Chia-Li Chien, PhD, CFP®, PMP®, CPBC	1.0	1.0
Social Security: Dispelling Common Myths with Essential Truths	Heather Schreiber, RICP®, NSSA®	2.0	2.0
The Retirement Income Landscape Today (Episode 1)	Eric Ludwig, PhD, CFP®, RICP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Redefining Optimal: Aligning Retirement Strategies with Your Life's Why (Episode 2)	Eric Ludwig, PhD, CFP®, RICP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®, and David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Retiring is a Change Management Issue (Episode 3)	Eric Ludwig, PhD, CFP®, RICP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Unlocking Retirement Success: Five Crucial Conversations Advisors are Currently Having About Reverse Mortgages	Don Graves, RICP®, CLTC®,CSA®	1.0	1.0
Adaptive Approaches to Retirement Income (Episode 4)	Eric Ludwig, PhD, CFP®, RICP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP, and Christine Benz	1.0	1.0
Mastering Market Volatility, Longevity, and Tax Optimization with Reverse Mortgages	Don Graves, RICP®, CLTC®,CSA® and Wade D. Pfau, PhD, CFA, RICP®	1.0	1.0
How to Understand, Communicate, and Plan for Risk in Retirement	Justin Fitzpatrick, PhD, CFA, CFP®	1.0	1.0
Beating Biases in Retirement Planning (Episode 5)	Eric Ludwig, PhD, CFP®, RICP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
The Future Self and Better Retirement Decisions (Episode 6)	Eric Ludwig, PhD, CFP®, RICP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Behavioral Finance and Retirement Planning	Michael Finke, PhD, CFP® and David Blanchett, PhD, CFP®	2.0	2.0
The Future of Social Security — What Advisors Need to Know	Michael Finke, PhD, CFP®, Jason Fichtner, PhD, Brandon Buckingham, PhD, and Andrew Biggs, PhD	1.0	1.0
Rewirement — Rewiring the Way You Think and Feel About Retirement	Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Hidden Retirement Dangers: Addiction, Abuse and Accelerating Costs	Cheryl Canzanella, CLU®, ChSNC®, CAP®, LUTCF®	1.0	1.0
Visualizing Retirement Through Your Retirement Sketchbook	Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Is the 4% Rule Broken? Safe Withdrawal Rates in Today’s Markets	Eric Ludwig, PhD, CFP®, RICP®	1.0	1.0
Unlocking Social Security Autonomy at Every Life Stage	Heather Schreiber, RICP®, NSSA®	1.0	1.0

Retirement Planning Continued

Title	Presenter(s)	The American College CE	CFP Board General CE
Ed Slott's 2026 Retirement Tax Playbook - How Proactive Planning Can Permanently Lower Lifetime Taxes	Ed Slott, CPA	1.0	1.0
Real-World Case Studies in Advanced Retirement Income Solutions	Zipporah Evania, CFP®, CLU®, ChFC®, CASL®, CAP®, RICP®, CLTC®, WMCP® and Jim Karthaus CFP®, CLU®, ChFC®, MA	1.0	1.0
Beyond the Claiming Age: Integrating Social Security into Retirement Planning	Martha Shedden, RSSA®, CRPC®	1.0	1.0

Financial Planning

Title	Presenter(s)	The American College CE	CFP Board General CE
Financial Advice 3.0: The Past, Present, and Future of the Profession	Adam Holt, CFP®, ChFC®	1.0	1.0
Frameworks for Financial Diagnosis: A Deep Dive into Effective Conversations	Adam Holt, CFP®, ChFC®	1.0	1.0
How You Deliver Advice Matters: New Levels of Engagement to Satisfy the Experience Economy	Adam Holt, CFP®, ChFC®	1.0	1.0
Improving Client Relationships and Outcomes through the Inclusive Financial Wellbeing and Empowerment Model	Timi Joy Jorgenson, PhD	1.0	1.0
AI, Prompt Engineering and Financial Planning	Eric Ludwig, PhD, CFP®, RICP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF®	1.0	1.0
Estate Planning of Digital Assets (Episode 7)	Eric Ludwig, PhD, CFP®, RICP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
The Financial Burdens of the Opioid Epidemic	Cheryl Canzanella, CLU®, ChSNC®, LUTCF	1.0	1.0
The Hidden Code of End-of-Life Decisions	Michael Finke, PhD, CFP®	1.5	1.5
Cognitive Decline Among Aging Clients - A Guide for Financial Investors		4.0	4.0
Knowing the Whole Truth and Planning for It	David F. Pierce, MSFS, MSM, MA, AEP®, ChFC®, CLF®, CLU®	1.0	1.0
Special Needs Planning 101: Critical Insights for Every Practitioner	Joellen Meckley, JD, MHS, ChSNC and Thomas M. Brinker, Jr. JD, LLM, PFS/CPA, AEP®, ChFC®	1.5	1.5

Philanthropic Planning

Title	Presenter(s)	The American College CE	CFP Board General CE
Planned Giving: Fun with Taxes and Probate	Jennifer Lehman, PhD, JD, CFP®, CAP®	1.0	1.0
Where Philanthropy Fits in Legacy Planning for Families of Significant Wealth	Phil Cubeta, CLU®, CHFC®, MSFS, AEP®, CAP®	1.0	1.0
DAF Grants May Be Denied: Are You Ready to Respond?	Phil Cubeta, CLU®, CHFC®, MSFS, AEP®, CAP®	1.5	1.5
Exploring Donor-Advised Funds as a Charitable Giving Vehicle	Andrew Grumet and Corey Ziegler	1.0	1.0
Principal Gifts in Nonprofit Gift Planning	Phil Cubeta, CLU®, CHFC®, MSFS, AEP®, CAP®	2.0	2.0

Tax Planning

Title	Presenter(s)	The American College CE	CFP Board General CE
Quantifying the Impact of Tax Planning	Michael Finke, PhD, CFP®	1.0	1.0
Principles of Tax Planning for Financial Advisors	Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA	1.0	1.0
Planning with Net Unrealized Appreciation	Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA	1.0	1.0
Planning Strategies to Mitigate the Impact of the 10-Year Rule	Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA	1.0	1.0
Small Business Strategies for Navigating the QBI Deduction and Real Estate Ownership	Sophia Duffy, JD, CPA	1.0	1.0
Decoding the Income Tax Impacts of the One Big Beautiful Bill Act	Jeffrey Levine, CFP®, CPA/PFS, ChFC®, RICP®, CWS, AIF, BFA™, MSA and Ben Birken, CFP®	1.0	1.0

Wealth Management

Title	Presenter(s)	The American College CE	CFP Board General CE
It's Good to Have Options: Introducing RILAs	David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Navigating the Crypto Landscape to Set the Stage for Financial Planning	Tyrone V. Ross, Jr.	1.0	1.0
No Portfolio is an Island	David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Leading with Proactive Advice during "Moments That Matter"	Philipp Hecker	1.0	1.0
Investing in Behavioral Markets	Michael Finke, PhD, CFP®	2.0	2.0
Aligning Investment Portfolios with Client Values	Andrew Tudor, CFP®, RICP®, CAP®	1.0	1.0
The Importance of Business Valuation for Financial Planners	Daniel Hiebert, PhD, CFP® and Jason Early, Founder @ RISR	1.0	1.0
Managing Retirement Risks: Longevity, Markets, and Spending Shocks	James Karthaus, CFP®, CLU®, ChFC®, MA and Wade Pfau, PhD, CFA, RICP®	1.0	1.0
Leveraging Equity Portfolios for Sustainable Income	Kris Etter CFP®, ChFC®, RICP®, and Jim Karthaus CFP®, CLU®, ChFC®, MA	1.0	1.0

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