



Chapter Advanced Continuing Education Credit Guide

Effective January 1, 2024, the Society of Financial Service Professionals (FSP) merged into the NAIFA family and continues its role as the preeminent provider of professional development in our industry. In addition to the insurance continuing education that is commonly offered by our Chapters, you now have access to an increased offering of qualified programs for a much broader spectrum of credits to serve our expanded membership of attorneys, certified public accountants, and others in the financial services industry.

As NAIFA's newly integrated organization aims to empower financial professionals through world-class advocacy and education, NAIFA is pleased to offer CLE, CPE, CFP, and PRC filing on behalf of our Chapters. At this juncture, State Chapters are still responsible for handling their own filings, and those of their Local Chapters, for insurance continuing education, either as providers or through a partnership with a qualified provider.

Types of Continuing Education Offered

Continuing Legal Education (CLE)

- Professional education for attorneys.
- Credits are required for license renewal.
- Requirements for CLE vary by [State](#).

Continuing Professional Education (CPE)

- Professional education for CPAs.
- Credits are required for license renewal.
- Requirements for CPE vary by [State](#).

Certified Financial Planner (CFP)

- Professional education for financial planners.
- Credits are required for certification renewal.
- Requirements for CFP are administered by the [CFP Board](#).

Professional Recertification Credits (PRC)

- Professional education for holders of American College designations.
- Credits are required for certification renewal.
- Requirements for PRC are administered by [The American College](#).

To obtain CLE, CPE, CFP, or PRC credits for your Chapter's programs, follow the processes described below.

Before the Program

No later than thirty (30) days before your program, please send the below information to Caprice Evans, Continuing Education & Professional Development Coordinator, at cevens@naifa.org:

- **Event Information**
 - Date
 - Time
 - Location

- **Program Information**
 - Title
 - Total Number of CE Hours Being Requested
 - Description (2-3 Sentences)
 - Timed Outline/Agenda
 - Learning Objective(s)
 - Sample of Written Materials or Presentation
 - Speaker Biography

During the Program

Live Courses: Attendance must be tracked and verified via sheets including the attendee's name, appropriate license number, time-in/time-out and signature. All attendance sheets should also be signed by the Program Monitor. A sample attendance sheet will be provided.

Webinars: The software platform used to host webinars must have the ability to verify attendee time-in/time-out. In addition, at least three attention checks per hour are required for CPE credit. Attention checks can include polling questions or codes conducted at random times. The use of Zoom's chat feature is also acceptable.

After the Program

Please send completed sign-in sheets to Caprice Evans at cevens@naifa.org for attendance reporting and certificates. Certificates of completion will be sent to the Program Monitor for distribution.

All fees (if applicable) will be invoiced following the program. Fees include application and attendance reporting fees.

- CLE – Fees vary by State. See attached CLE Filing Fees document.
- CFP – \$25 per CE hour requested.
- CPE – \$50 per program/event.

Resources

For additional assistance, please contact Caprice Evans at cevens@naifa.org or 610-526-2507.



Continuing Legal Education Filing Fees

Alabama	\$ 25	Oregon	\$ 40
Alaska	\$ 50 <i>(if held in state)</i>	Pennsylvania	\$ 25
Arizona	\$ 0	Rhode Island	\$ 45
Arkansas	\$ 0	South Carolina	\$ 75
California	\$115	South Dakota*	----
Colorado	\$ 50	Tennessee	\$ 0
Connecticut*	----	Texas	\$ 50
Delaware	\$ 50	Utah	\$ 25
District of Columbia*	----	Vermont	\$ 0
Florida	\$150	Virginia	\$ 75
Georgia	\$ 0	Washington	\$ 75
Hawaii	\$100 <i>(per credit hour)</i>	West Virginia	\$ 50
Idaho	\$ 40	Wisconsin	\$ 50
Illinois	\$ 50	Wyoming	\$ 50
Indiana	\$ 25		
Iowa	\$ 25		
Kansas	\$ 25		
Kentucky	\$ 20		
Louisiana	\$ 50		
Maine	\$ 45		
Maryland*	----		
Massachusetts*	----		
Michigan*	----		
Minnesota	\$ 21.50		
Mississippi	\$ 0		
Missouri	\$ 0		
Montana	\$ 60		
Nebraska	\$ 50		
Nevada	\$ 50		
New Hampshire	\$ 0		
New Jersey	\$100		
New Mexico	\$ 50		
New York	\$ 0		
North Carolina	\$ 0		
North Dakota	\$ 45		
Ohio	\$ 50 <i>(if held in state)</i>		
Oklahoma	\$ 50		

*Do not require mandatory continuing legal education.