eMoney

FAQ

Live Training Sessions Approved for CE Credits

In 2019, the CFP Board updated their standards to include technology training toward earning continuing education (CE) credits. As a result, eMoney Live Training Workshops are eligible for continuing education hours. We continue to work with the CFP Board on adding more CE-eligible software training sessions.

Q. Which sessions are approved for CE credits?

A. The following eMoney Live Training Workshops are eligible to earn CFP® CE credits:

- **Platform Essentials (4 CFP® CE credits)** – Learn the essentials for getting started with the eMoney platform, delivering a differentiated client experience, and developing a financial plan—quickly and efficiently.
- **Planning Fundamentals Part 1 (4 CFP® CE credits)** – Learn the fundamentals for creating comprehensive financial plans by identifying key facts, efficient data entry strategies, and how to use eMoney reports to validate the data.
- **Planning Fundamentals Part 2 (4 CFP® CE credits)** – Learn the fundamentals of incorporating interactive planning tools into your financial planning process.
- **Comprehensive Planning Session A (4 CFP® CE credits)** – Led by an eMoney CFP® professional, this course is designed to examine advanced planning strategies for cash flow, as well as retirement planning, education planning, stock options, and income tax planning.
- **Comprehensive Planning Session B (4 CFP® CE credits)** – Led by an eMoney CFP® professional, this course is designed to examine advanced planning strategies for running Monte Carlo simulations, annuities, insurance, and estate planning.

Q. Is there an additional cost to obtain the CE credit?

A. There is a fee to attend each Live Training session, but there is no additional cost to obtain CE credits.

Q. How can users register?

A. Visit our Live Training page to view pricing, session agendas, the upcoming schedule, and more. You can also access this page in the Help menu in your eMoney app.

Q. How will my CE credits be reported?

A. eMoney will report attendance to the CFP Board. Attendees will receive confirmation from the CFP Board when the credits have been earned.

Q. How long will it take for the credit to be reported?

A. It can take up to two weeks to report attendance to the CFP Board.

Q. Can these CE credits be used to maintain other designations?

A. Potentially. eMoney will send a confirmation email to attendees, which can be used to self-report your attendance to the governing body that oversees your additional designation(s). See below for details on particular designations:

National Association of Personal Financial Advisors (NAPFA)

- No specific designations, instead this is a professional organization that has CE requirements
- NAPFA recognizes programs that are accepted as CE by the CFP Board
- Visit napfa.org for more information

American College Designations

- Examples: WMCP®, RICP®, ChFC®, CLU®, FSCP®, ChSNC®, CAP®, CLF®, CASL®
- American College recognizes programs that are accepted as CE by the CFP Board
- Visit theamericancollege.edu/ for more information

Certified Public Accountant (CPA)

- Dependent on the state board of accountancy in which the individual is registered
- Generally recognizes programs that are accepted as CE by the CFP Board
- Visit nasbaregistry.org/cpe-requirements for more information

CFA Institute

- Chartered Financial Analyst® (CFA®) designation
- CFA Institute recognizes programs that are accepted as CE by the CFP Board
- Visit cfainstitute.org/en/membership/professional-development/ce for more information

Investments & Wealth Institute

- CIMA®/CIMC®/CPWA®/RMA®
- The institute generally recognizes programs accepted as CE by the CFP Board
- Visit investmentsandwealth.org/home for more information

Insurance Licenses

- Dependent on the state in which the individual is licensed
- Generally do not recognize programs that are accepted as CE by the CFP Board
- Visit statece.com/blog/insurance/insurance-agents-continued-education/ for more information

Q. Does eMoney offer additional continuing education webinars?

A. Each month, we offer a free, virtual CE webinar. In these sessions, we focus on financial planning industry education as opposed to eMoney software training. To obtain CE credits, you must first register, and then attend the entire live webinar.

Visit info.emoneyadvisor.com/ce-program-registration to learn more and register for our latest programs.

Q. What if I have more CE-related questions?

A. For questions and concerns related to continuing education, please email CE@emoneyadvisor.com.