

CE Sponsors are required to provide Certificates of Completion to individuals that successfully complete programs registered with CFP Board. CE Sponsors must retain these records for a period of four years following the date of each program completion. All records are subject to audit and review by CFP Board.

Calculating Credit Hours

Programs must be at least one hour in duration (a minimum of 50 minutes constitutes one class hour). Beyond this, each additional half-hour will can be considered, rounded down to the last full half hour.

For full guidelines on CFP Board's CE Sponsor requirements, please visit www.cfp.net/cesponsor.

The following items* must be included on the certificate of completion as shown below:

1. Sponsor Name
2. Sponsor Contact Information
3. Name of CFP® professional
4. Program Name
5. CFP Board Program ID
6. Number of CE credits
7. Date of completion
8. Location of program (if live)
9. Program administrator's signature

*Must be listed on the certificate exactly as registered with CFP Board.

Sample Certificate

Example CE Sponsor Name, LLC ^①

123 Main Street, Exampletown, MD 12345

555-555-5555 ^②

Certificate of Completion

This Certificate is Presented to:

Firstname Lastname ^③

For successful completion of

Program Name ^④

CFP Board Program ID ^⑤

For 3 CFP Board CE Credits ^⑥

^⑦ On 1 January 2000

In Example City, VA 54321 ^⑧

^⑨

Program Administrator's Signature