



TRAINING PROGRAM CE ELIGIBILITY INFORMATION

To Whom It May Concern:

Fi360, Inc. is registered as a sponsor of continuing professional education with the following organizations. The number of credits hours approved for fi360, Inc. trainings is listed below.

CFP® BOARD OF STANDARDS (CFP® DESIGNATION):

AIF® Designation Training – Online format:	7 hours
AIF® Designation Training – Capstone format:	15 hours
AIFA® Designation Training:	22 hours
Fiduciary Essentials for Investment Advisors Training:	8 hours
Fiduciary Implications of Financial Planning Training:	7 hours total (1 hour per module)

IMCA (CIMA®, CIMC® AND CPWA® DESIGNATIONS):

AIF® Designation Training – Online format:	14 hours (non-IMCA sponsored)
AIF® Designation Training – Capstone format:	22 hours (non-IMCA sponsored)
AIFA® Designation Training:	22.5 hours (non-IMCA sponsored)
Fiduciary Essentials for Investment Advisors Training:	Not Eligible
Fiduciary Implications for Financial Planning Training:	Not Eligible

NASBA (CPA DESIGNATION):

AIF® Designation Training – Online format:	Not Eligible
AIF® Designation Training – Capstone format:	7 hours
AIFA® Designation Training:	23 hours
Fiduciary Essentials for Investment Advisors Training:	7 hours
Fiduciary Implications of Financial Planning Training:	7 hours

ASPPA® (QKA, QPA, QPFC DESIGNATIONS):

AIF® Designation Training - Online format:	7 hours
AIF® Designation Training – Capstone format:	15 hours
AIFA® Designation Training:	22 hours
Fiduciary Essentials for Investment Advisors Training:	Not Eligible
Fiduciary Implications for Financial Planning Training:	Not Eligible

THE AMERICAN COLLEGE (CLU AND ChFC DESIGNATIONS):

AIF® Designation Training - Online format:	8 hours
AIF® Designation Training – Capstone format:	15 hours
AIFA® Designation Training:	22 hours
Fiduciary Essentials for Investment Advisors Training:	Not Eligible
Fiduciary Implications of Financial Planning Training:	Not Eligible

FINANCIAL SERVICE STANDARDS (PPC DESIGNATION):

AIF® Designation Training - Online format:	8 hours
AIF® Designation Training – Capstone format:	15 hours
AIFA® Designation Training:	22 hours
Fiduciary Essentials for Investment Advisors Training:	8 hours
Fiduciary Implications of Financial Planning Training:	7 hours

INSTITUTE OF CERTIFIED BANKERS (CRSP, CTFA AND FID DESIGNATIONS):

AIF® Designation Training - Online format:	7 hours (CE credit is NOT eligible for FID designation)
AIF® Designation Training – Capstone format:	15 hours
AIFA® Designation Training:	22 hours
Fiduciary Essentials for Investment Advisors Training:	10 hours
Fiduciary Implications of Financial Planning Training:	Not Eligible

PA INSURANCE DEPARTMENT (COURSES ARE REGISTERED ONLY IN PA; PLEASE FILE OTHER STATES INDEPENDENTLY):

AIF® Designation Training – Online format:	Not Eligible
AIF® Designation Training – Capstone format:	6 hours
AIFA® Designation Training:	20 hours
Fiduciary Essentials for Investment Advisors Training:	Not Eligible
Fiduciary Implications of Financial Planning Training:	Not Eligible

PA CLE BOARD (COURSES ARE REGISTERED ONLY IN PA; PLEASE FILE OTHER STATES INDEPENDENTLY):

AIF® Designation Training – Online format:	Not Eligible
AIF® Designation Training – Capstone format:	Not Eligible
AIFA® Designation Training:	21.5 hours
Fiduciary Essentials for Investment Advisors Training:	Not Eligible
Fiduciary Implications of Financial Planning Training:	Not Eligible

CFA INSTITUTE (CFA INSTITUTE CHARTERHOLDERS):

AIF® Designation Training – Online format:	7 hours
AIF® Designation Training – Capstone format:	15 hours
AIF® Designation Training:	22 hours
Fiduciary Essentials for Investment Advisors Training:	7 hours
Fiduciary Implications of Financial Planning Training:	Not Eligible



*CFP® CE AND PA INSURANCE CE CREDIT WILL BE REPORTED ELECTRONICALLY FOR ALL STUDENTS WHO INDICATE CFP OR PA INSURANCE ON THE CE REQUEST FORM THAT ACCOMPANIES THIS LETTER ON THE LAST FRIDAY OF EVERY MONTH. ALL OTHER CE REQUESTS WILL BE PROCESSED WITHIN 10 BUSINESS DAYS OF RECEIPT OF REQUEST. STUDENTS INTERESTED IN THE CLU OR CHFC DESIGNATIONS NEED ONLY SUBMIT THEIR CERTIFICATE OF COMPLETION TO THE AMERICAN COLLEGE TO RECEIVE THE CREDIT STATED ABOVE. A CERTIFICATE WILL BE SENT TO EACH STUDENT WHO INDICATES THE CTFA, CIMA, CIMC, CLU, CHFC, CRSP, CTFA, FID, PPC AND CPA DESIGNATIONS OR INDICATES HE OR SHE NEEDS PA CLE ON THE CE REQUEST FORM. THOSE STUDENTS ARE RESPONSIBLE FOR SUBMITTING THEIR CONTINUING EDUCATION PAPERWORK TO THE RESPECTIVE ENTITIES.

Respectfully,
fi360 Training Team



* Fi360, Inc is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.