

# Continuing Education Credits 2024



Designation	Ascend 2024	Virtual Compliance & Education Summit	IRA Essentials, Advanced IRA, IRAs A-Z, HSA Workshop, Virtual HSA A-Z	IRA Essentials OnDemand	IRA/HSA Frontline Fundamentals **	IRA Institute (onsite, online or virtual)	IRA University	HSA University	Compliance webinar or digital recording
AAMS	*	*	*	*	*	*	--	--	*
AIF/AIFA	*	*	--	--	--	--	--	--	--
CFA	*	*	--	--	--	--	--	--	*
CFP	--	--	--	--	--	--	--	--	--
ChFC	*	*	--	--	--	--	--	--	*
CHSP	1.5 per HSA course	12 + 1.5 per HSA prerecorded course	7.25 HSA course only	--	3.75 HSA course only	--	--	13.25	1.5 HSA course
CIMA	*	*	--	--	--	--	--	--	*
CIP	1.5 per course	12 + 1.5 per prerecorded course	7.25	7.25	3.75	29.5	--	13.25	1.5
CIS	1.5 per course	12 + 1.5 per prerecorded course	7.25	7.25	3.75	29.5	18 CIS I only	13.25	1.5
CISP	18.5	12 + 1.5 per prerecorded course	7.25	7.25	3.75	29.5	18	13.25	1.5
CPC	*	*	*	*	*	*	--	--	*
CRC	*	*	*	*	*	*	--	--	*
CRPC/CRPS	*	*	*	*	*	*	--	--	*
CRSP	18.5	12 + 1.5 per prerecorded course	7.25	7.25	3.75	29.5	18	13.25	1.5
CTFA	18.5	12 + 1.5 per prerecorded course	7.25	7.25	3.75	29.5	18	13.25	1.5
NCCO	1.5 per course	12 + 1.5 per prerecorded course	7.25	7.25	3.75	29.5	--	13.25	1.5
QKA	*	*	--	--	--	--	--	--	*
QPA	*	*	--	--	--	--	--	--	*
QPFC	*	*	--	--	--	--	--	--	*
RICP	*	*	*	--	*	--	--	--	*
RP	*	*	*	--	*	--	--	--	*

\* This course is eligible for CE credits for this designation. For number of credits available, contact the designation sponsoring organization.

4/29/2024

\*\* This course is available in limited locations. Contact your Ascensus Sales Representative for information.

\*\*\* This course is not eligible for CE credit: CHSP Exam Prep Workshop, CIS II Exam Prep Workshop, HSA Certification Workshop, and IRAdirect® sessions.

-- This course has not been submitted for CE credits for this designation.

AAMS	Accredited Asset Management Specialist	CIS	Certified IRA Specialist	NCCO	NAFCU Certified Compliance Officer
AIF/AIFA	Accredited Investment Fiduciary/Analyst	CISP	Certified IRA Services Professional	QKA	Qualified 401(k) Administrator
CFA	Chartered Financial Analyst	CPC	Certified Pension Consultant	QPA	Qualified Pension Administrator
CFP	Certified Financial Planner	CRC	Certified Retirement Counselor	QPFC	Qualified Plan Financial Consultant
ChFC	Chartered Financial Consultant	CRPC	Chartered Retirement Planning Counselor	RICP	Retirement Income Certified Professional
CHSP	Certified Health Savings Professional	CRPS	Chartered Retirement Plans Specialist	RP	Registered Paraplanner
CIMA	Certified Investment Management Analyst	CRSP	Certified Retirement Services Professional		
CIP	Certified IRA Professional	CTFA	Certified Trust & Financial Advisor		

# eLearning

CE credits for eLearning courses are available only for the designations listed.

<i>Designation</i>	<i>CHSP</i>	<i>CIP/NCCO</i>	<i>CIS</i>	<i>CISP</i>	<i>CRSP</i>	<i>CTFA</i>
529 Plans	n/a	1.25	1.25	1.25	1.25	1.25
Comparing Roth & Traditional IRAs	n/a	1.75	1.75	1.75	1.75	1.75
Conversions	n/a	1.75	1.5	1.75	1.75	1.75
Coverdell Education Saving Accounts	n/a	1.75	1.75	1.75	1.75	1.75
Employer Sponsored Plan Portability	n/a	1.75	1.75	1.75	1.75	1.75
Establishing an IRA	n/a	1.75	1.75	1.75	1.75	1.75
Funding HSAs	1	1	1	1	1	1
Handling IRA Legal Issues	n/a	1.75	1.75	1.75	1.75	1.75
HSA Basics	1.5	1.75	1.75	2	2	2
HSA Distribution Issues	1	1	1	1	1	1
HSAs - Introduction and Establishment	1	1	1	1	1	1
HSA Portability and Compliance	1	1	1	1	1	1
Individual(k)	n/a	1.75	1.75	1.75	1.75	1.75
IRA Authoritative Hierarchy	n/a	1.75	1.75	1.75	1.75	1.75
IRA Beneficiary Options	n/a	2.5	2.5	2.5	2.5	2.5
IRA Compliance	n/a	1.75	1.75	1.75	1.75	1.75
IRA Contributions	n/a	1.75	1.75	1.75	1.75	1.75
IRA Distributions	n/a	1.75	1.75	1.75	1.75	1.75
IRA Excess Contributions and Recharacterizations	n/a	1.75	1.75	1.75	1.75	1.75
IRA Required Reporting	n/a	1.75	1.75	1.75	1.75	1.75
IRA to IRA Transfers and Rollovers	n/a	1.75	1.75	1.75	1.75	1.75
QPlan Basics	n/a	1.75	1.75	1.75	1.75	1.75
Roth 401(k)	n/a	1.75	1.75	1.75	1.75	1.75
SEP Plans	n/a	1.75	1.75	1.75	1.75	1.75
SIMPLE IRAs	n/a	1.75	1.75	1.75	1.75	1.75
Substantially Equal Periodic Payments	n/a	1.75	1.75	1.75	1.75	1.75
Traditional IRA RMD	n/a	2.25	2.25	2.25	2.25	2.25