

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 or online)	IRA University	HSA University	Compliance webinar or digital recording
AAMS	*	*	*	*	*	*	--	--	*
AIF/AIFA	*	*	--	--	--	--	--	--	--
CFA	*	*	--	--	--	--	--	--	*
CFP	--	--	--	--	--	--	--	--	--
ChFC	*	*	--	--	--	--	--	--	*
CHSP	1.5 per HSA course	1.5 per HSA course	7.25 HSA course only	--	3.75 HSA course only	--	--	13.25	1.5 HSA only
CIMA	*	*	--	--	--	--	--	--	*
CIP	1.5 per course	1.5 per course	7.25	7.25	3.75	29.5	--	13.25	1.5
CIS	1.5 per course	1.5 per course	7.25	7.25	3.75	29.5	18 CIS I only	13.25	1.5
CISP	20	Pending	7.25	7.25	3.75	29.5	18	13.25	1.5
CPC	*	*	*	*	*	*	--	--	*
CRC	*	*	*	*	*	*	--	--	*
CRPC/CRPS	*	*	*	*	*	*	--	--	*
CRSP	20	Pending	7.25	7.25	3.75	29.5	18	13.25	1.5
CTFA	20	Pending	7.25	7.25	3.75	29.5	18	13.25	1.5
NCCO	1.5 per course	1.5 per 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.

2/27/2024

** 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
AIF/AIFA Accredited Investment Fiduciary/Analyst
CFA Chartered Financial Analyst
CFP Certified Financial Planner
ChFC Chartered Financial Consultant
CHSP Certified Health Savings Professional
CIMA Certified Investment Management Analyst
CIP Certified IRA Professional

CIS Certified IRA Specialist
CISP Certified IRA Services Professional
CPC Certified Pension Consultant
CRC Certified Retirement Counselor
CRPC Chartered Retirement Planning Counselor
CRPS Chartered Retirement Plans Specialist
CRSP Certified Retirement Services Professional
CTFA Certified Trust & Financial Advisor

NCCO NAFCU Certified Compliance Officer
QKA Qualified 401(k) Administrator
QPA Qualified Pension Administrator
QPFC Qualified Plan Financial Consultant
RICP Retirement Income Certified Professional
RP Registered Paraplanner

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