

Continuing Education Credits 2020



Designation	Virtual Compliance & Legislative Summit	IRA Essentials/ Advanced IRA or HSA Workshop	IRA Essentials OnDemand	IRA/HSA Frontline Fundamentals **	IRA Institute	IRA Institute Online	IRA University	HSA University	Compliance Webinar or digital version
AAMS	*	*	*	*	*	*	--	--	*
AIF/AIFA	*	--	--	--	--	--	--	--	--
CFA	*	--	--	--	--	--	--	--	*
CFP	1.5 per course	--	--	--	--	--	--	--	--
ChFC	*	--	--	--	--	--	--	--	*
CHSP	1.5 per HSA course	7.25 HSA course only	--	3.75 HSA course only	--	--	--	12	1.5 HSA only
CIMA	*	--	--	--	--	--	--	--	*
CIP	1.5 per course	7.25	7.25	3.75	33.5	33.5	--	--	1.5
CIS	1.5 per course	7.25	7.25	3.75	33.5	33.5	15 CIS I only	--	1.5
CISP	1.5 per course pending	7.25	7.25	3.75	33.5	33.5	--	--	1.5
CPA/PFS	1.5 per course	--	--	--	--	--	--	--	--
CPC	*	*	*	*	*	*	--	--	*
CRC	*	*	*	*	*	*	--	--	*
CRPC/CRPS	*	*	*	*	*	*	--	--	*
CRSP	1.5 per course pending	7.25	7.25	3.75	33.5	33.5	--	--	1.5
CTFA	1.5 per course pending	7.25	7.25	3.75	33.5	33.5	--	--	1.5
NCCO	1.5 per course	7.25	7.25	3.75	33.5	33.5	--	--	1.5
QKA	*	--	--	--	--	--	--	--	*
QPA	*	--	--	--	--	--	--	--	*
QPFC	*	--	--	--	--	--	--	--	*
RICP	*	*	--	*	--	--	--	--	*
RP	*	*	--	*	--	--	--	--	*

*Course is eligible for CE credits for this designation. For number of credits available, client will need to contact designation sponsoring organization.

9/1/2020

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

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
 CPA Certified Public Accountant
 CPC Certified Pension Consultant
 CRC Chartered 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
 PFS Personal Financial Specialist
 QKA Qualified 401(k) Administrator
 QPA Qualified Pension Administrator
 QPFC Qualified Plan Financial Consultant
 RICP Retirement Income Certified Professional
 RP Registered Paraplanner

2020 eLearning Courses:

CE credits for eLearning 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	1.75	1.75	1.75
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

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