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Advanced Planning

Title	Presenter(s)	The American College CE	CFP Board CE
Advanced Considerations when Navigating Crypto in Financial Planning	Tyrone V. Ross, Jr.	1.0	1.0
Five Unique Planning Considerations for Aging Parents of Disabled Children	Joellen Meckley, JD, MHS, ChSNC®	1.0	1.0
New Horizons in Estate Planning	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
When Life Throws a Curveball: Planning Essentials for Clients Impacted by Disability	Joellen Meckley, JD, MHS, ChSNC®	1.0	1.0
Convert More Prospects with a Simplified Scalable Approach	Jason L. Smith, CEP®, BPC	1.0	1.0
Buying U.S. Property for U.S. Non-Citizens	Chia-Li Chien, PhD, CFP®, PMP®, CPBC	1.0	1.0
Roth Conversions Prior to Sunset	Robert S. Keebler, CPA/PFS, MST, AEP	1.0	1.0

Ethics in Financial Planning

Title	Presenter(s)	The American College CE	CFP Board CE
AI Ethics in Financial Services: Ethical Considerations of ChatGPT	Azish Filabi, JD, MA, Eric Ludwig, PhD, CFP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF®	1.0*	1.0
Trust in Financial Services	Azish Filabi, JD, MA, Domarina Oshana, PhD, Katherina G. Pattit, PhD, and Jason M. Pattit, PhD	1.0	1.0
Navigating Ethics and Regulation of AI	Azish Filabi, JD, MA	1.0*	1.0

*This course meets The College's Professional Recertification Program (PRP) ethics CE requirement.

Financial Planning

Title	Presenter(s)	The American College CE	CFP Board CE
Financial Advice 3.0: The Past, Present, and Future of the Profession	Adam Holt, CFP®, ChFC®	1.0	1.0
Frameworks for Financial Diagnosis: A Deep Dive into Effective Conversations	Adam Holt, CFP®, ChFC®	1.0	1.0
How You Deliver Advice Matters: New Levels of Engagement to Satisfy the Experience Economy	Adam Holt, CFP®, ChFC®	1.0	1.0
Crypto Assets in Financial Planning: A Fiduciary Approach	Tyrone V. Ross, Jr.	1.0	1.0
Improving Client Relationships and Outcomes through the Inclusive Financial Wellbeing and Empowerment Model	Timi Joy Jorgenson, PhD	1.0	1.0
AI, Prompt Engineering and Financial Planning	Eric Ludwig, PhD, CFP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF®	1.0	1.0
The Financial Burdens of the Opioid Epidemic	Cheryl Canzanella, CLU®, ChSNC®, LUTCF	1.0	1.0
Navigating the TCJA Sunset Provisions	Ben Birken, CFP®, Mike Lecours, CFP®, and Chris Granger, CFP®	1.0	1.0
Cognitive Decline Among Aging Clients - A Guide for Financial Advisors		4.0	4.0
The Hidden Code of End-of-Life Decisions	Michael Finke, PhD, CFP®	1.5	1.5
Knowing the Whole Truth and Planning for It	David F. Pierce, MSFS, MSM, MA, AEP®, ChFC®, CLF®, CLU®	1.0	1.0

Insurance & Risk Management

Title	Presenter(s)	The American College CE	CFP Board CE
Life Insurance and Changing Demographics for Women	Sophia Duffy, JD, CPA	1.0	1.0
The Value of Permanent Life Insurance in Wealth Management	Michael Finke, PHD, CFP® and Ragiv Rebello	1.0	1.0
Life Insurance and Annuities in a Changed Planning Environment	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
Key Person and Corporate Owned Life Insurance Planning	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
From Policy to Practice: LTC Insurance Trends and Planning Strategies When Benefits Are Used	Kaylee Ranck, PhD, Joellen Meckley, JD, MHS, ChSNC®, and James Karthaus, MA, CFP®, CLU®, ChFC®	1.0	1.0
Fiduciary Insights, Mitigating Risks: GUL vs. VUL	James Karthaus, CFP®, CLU®, ChFC®, MA	2.0	2.0

Philanthropic Planning

Title	Presenter(s)	The American College CE	CFP Board CE
Connecting With Donors	Jennifer Lehman, PhD, JD, CFP®, CAP®	1.0	1.0
Planned Giving: Fun with Taxes and Probate	Jennifer Lehman, PhD, JD, CFP®, CAP®	1.0	1.0
Where Philanthropy Fits in Legacy Planning for Families of Significant Wealth	Phil Cubeta, CLU®, ChFC®, MSFS, AEP®, CAP®	1.0	1.0
DAF Grants May Be Denied: Are You Ready to Respond?	Phil Cubeta, CLU®, ChFC®, MSFS, AEP®, CAP®	1.5	1.5
Exploring Donor-Advised Funds as a Charitable Giving Vehicle	Andrew Grumet and Corey Ziegler	1.0	1.0
Principal Gifts in Nonprofit Gift Planning	Philip Cubeta, CLU®, ChFC®, MSFS, AEP®, CAP®	2.0	2.0

Practice Management

Title	Presenter(s)	The American College CE	CFP Board CE
Revolutionizing Financial Planning with ChatGPT: A Collaborative Approach between Technology and Human Expertise	Eric Ludwig, PhD, CFP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF®	1.0	1.0
Foundations of Digital Marketing for Financial Advisors	Intention.ly	1.0	N/A
Content Creation and Outreach	Intention.ly	1.0	N/A
Client Engagement and Retention	Intention.ly	0.9	N/A
Advanced Digital Marketing Strategies	Intention.ly	0.8	N/A
How to Communicate with Impact and Influence	Deirdre Van Nest	1.0	N/A
Are You Capitalizing on the SEC Marketing Rule?	Matt Seitz	1.0	1.0

Retirement Planning

Title	Presenter(s)	The American College CE	CFP Board CE
Drive Growth and Deeper Client Relationships with the Retirement Income Style Awareness	Wade Pfau, PhD, CFA, RICP® and Alex Murguia, PhD	2.0	2.0
SECURE Act's Definitive Distribution Roadmap for Inherited IRAs	Denise Appleby	1.0	1.0
Creating Tax-Efficiency for Retirement Income	Wade Pfau, PhD, CFA, RICP®	1.0	1.0
A Goals-Based Approach to Retirement Income Planning	Michael Finke, PHD, CFP®	1.0	1.0
Estimating the True Cost of Retirement	David Blanchett, PHD, MSFS, CFA, CLU®, ChFC®, CFP®	1.0	1.0
Redefining the Optimal Retirement Income Strategy	David Blanchett, PHD, MSFS, CFA, CLU®, ChFC®, CFP®	1.0	1.0
Snowbirding: Living in More Than One Location in Retirement	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
Social Security Compared to Annuities - Income Streams	Michael Finke, PHD, CFP®	1.0	1.0
Social Security Considerations in Estate Planning	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
The Retirement Planning Issue No One Wants to Discuss: Diminished Decision-Making Capacity	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
What The Secure Act 2.0 Means in Practice	Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP®	1.0	1.0
Maximizing Retirement Success: Beyond Assets and Liabilities	Chia-Li Chien, PhD, CFP®, PMP®, CPBC	1.0	1.0
Social Security: Dispelling Common Myths with Essential Truths	Heather Schreiber, RICP®, NSSA®	2.0	2.0
The Retirement Income Landscape Today (Episode 1)	Eric Ludwig, PhD, CFP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Redefining Optimal: Aligning Retirement Strategies with Your Life's Why (Episode 2)	Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®, and David Blanchett, PHD, MSFS, CFA, CLU®, ChFC®, CFP®	1.0	1.0
Retiring is a Change Management Issue (Episode 3)	Eric Ludwig, PhD, CFP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
Unlocking Retirement Success: Five Crucial Conversations Advisors are Currently Having About Reverse Mortgages	Don Graves, RICP®, CLTC®, CSA®	1.0	1.0
Adaptive Approaches to Retirement Income (Episode 4)	Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®, and Christine Benz	1.0	1.0
Mastering Market Volatility, Longevity, and Tax Optimization with Reverse Mortgages	Don Graves, RICP®, CLTC®, CSA® and Wade D. Pfau, PhD, CFA, RICP®	1.0	1.0
How to Understand, Communicate, and Plan for Risk in Retirement	Justin Fitzpatrick, PhD, CFA, CFP®	1.0	1.0
Beating Biases in Retirement Planning (Episode 5)	Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
The Future Self and Better Retirement Decisions (Episode 6)	Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®	1.0	1.0
How Secure is Your Retirement?	Sophia Duffy, JD, CPA, AEP and Stephen Parrish, JD, RICP®, AEP®	1.0	1.0
Behavioral Finance and Retirement Planning	Michael Finke, PhD, CFP® and David Blanchett, PhD, CFP®	2.0	2.0
Retirement Planning in a Turbulent Market	Michael Finke, PhD, CFP®, Wade Pfau, PhD, and David Blanchett, PhD, CFP®	2.0	2.0

Retirement Planning (Cont.)

Title	Presenter(s)	The American College CE	CFP Board CE
Hidden Retirement Dangers: Addiction, Abuse and Accelerating Costs	Cheryl Canzanella, CLU®, ChSNC®, CAP®, LUTCF®	1.0	1.0

Tax Planning

Title	Presenter(s)	The American College CE	CFP Board CE
Quantifying the Impact of Tax Planning	Michael Finke, PhD, CFP®	1.0	1.0
Principles of Tax Planning for Financial Advisors	Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA	1.0	1.0
Planning with Net Unrealized Appreciation	Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA	1.0	1.0
Planning Strategies to Mitigate the Impact of the 10-Year Rule	Jeffrey Levine, CPA/PFS, CFP®, ChFC®, RICP®, CWS®, BFA®, MSA	1.0	1.0
Small Business Strategies for Navigating the QBI Deduction and Real Estate Ownership	Sophia Duffy, JD, CPA	1.0	1.0

Wealth Management

Title	Presenter(s)	The American College CE	CFP Board CE
It's Good to Have Options: Introducing RILAs	David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Navigating the Crypto Landscape to Set the Stage for Financial Planning	Tyrone V. Ross, Jr.	1.0	1.0
No Portfolio is an Island	David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP®	1.0	1.0
Leading with Proactive Advice during "Moments That Matter"	Philipp Hecker	1.0	1.0
Investing in Behavioral Markets	Michael Finke, PhD, CFP®	2.0	2.0
Aligning Investment Portfolios with Client Values	Andrew Tudor, CFP®, RICP®, CAP®	1.0	1.0

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