

Kaplan Financial Education

Insurance Continuing Education Courses for CFP® Certification

The following Insurance Continuing Education courses are approved for CFP® Certification renewal*

Effective 11/14/19

Course Title	License Type	Delivery Method	Eligible Hours
2020 Tax Update	General	Classroom	4.50
401(k) Plans, 6th Edition	General	Self-study	4
Advance Planning for Senior Needs, 4th Edition	General	Self-study	5
Advising Clients on Medicare, 2nd Edition	General	Self-study	2
After the Crash, 2nd Edition	General	Classroom	9.50
AML Best Practices for the Life Insurance Industry, 2nd Edition	General	Self-study	1.50
Annuities for Today's Investor, 1st Edition, 3rd Revision	General	Self-study	3
Annuities for Today's Investor, 1st Edition, 3rd Revision	General	Self-study	3
Annuity Concepts, 2nd Edition, Revised	General	Self-study	3
Annuity Fundamentals and Applying FINRA Rule 2330	General	Self-study	3
Annuity Suitability and Disclosure	General	Self-study	4
Annuity Suitability and Disclosure, 2nd Edition	General	Classroom	4
Annuity Suitability: 4-Hour Training Course, 2nd Edition	General	Self-study	3
Annuity Training Course - NAIC/FINRA Rules and Regulations	General	Self-study	5.50
Anti-Money Laundering Laws and Practices	General	Self-study	2.50
Anti-Money Laundering Rules for Insurance Companies	General	Self-study	1
Anti-Money Laundering Training for Insurance Professionals	General	Self-study	2
Anti-Money Laundering: Applying the Rules	General	Self-study	1
Anti-Money Laundering: Applying the Rules (Spanish)	General	Self-study	1
Anti-Money Laundering: Frequently Asked Questions	General	Self-study	1
Anti-Money Laundering: Suspicious Activities and SARs	General	Self-study	1
Asset Allocation in Variable Annuities, 2nd Edition	General	Self-study	1
Asset Allocation, 1st Edition Revised	General	Self-study	2
Behavioral Finance I: Why Good People Make Bad Investment Decisions	General	Classroom	4
Beneficiary Designations - Getting it Right	General	Classroom/Webinar	4
Beneficiary Designations: Treasure Chest or Time Bomb?, 2nd Edition	General	Classroom	4
Business Continuation Training Course, 3rd Edition	General	Self-study	5
Business Insurance Concepts, 10th Edition	General	Self-study	5
Buying Within Your Budget	General	Classroom	4
California 8-Hour Annuity Training Course, 3rd Edition	General	Self-study	5
Managing Assets and Income in Retirement	General	Classroom	4
Regulation and Ethics in the Insurance Industry	General	Classroom	3.50
Court's in Session: 2019	General	Classroom	4.50
Different Strokes for Different Folks, 1st Edition, Revised	General	Classroom	8
Disability Income Insurance, 4th Edition	General	Self-study	6
Distribution Planning: Required Distributions, 2nd Edition	General	Self-study	1
Equity-Indexed Annuities, 3rd Edition	General	Self-study	2
Estate Planning Concepts, 12th Edition	General	Self-study	5

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Course Title	License Type	Delivery Method	Eligible Hours
Estate Planning from A to Z, 1st Edition, Revised	General	Classroom	8
Ethical Insurance Producer	General	Self-study	3
Ethical Practices, 2nd Edition Revised	General	Self-study	4
Ethics for Insurance Professionals: A Practical Guide	General	Classroom/Webinar	3
Ethics for the Insurance Professional, 4th Edition	General	Self-study	3
Ethics, 3rd Edition	General	Self-study	3
Financial Challenges Facing Retirees, 4th Edition	General	Self-study	2.50
Financial Exploitation of Seniors and Annuity Suitability (FINRA Rule 2330)	General	Self-study	1.50
Financial Exploitation of Seniors: Why Insurance Agents Should Care	General	Self-study	1.50
Financial Planning Cornerstones, 3rd Edition, 2nd Revision	General	Classroom	9.50
Financial Planning Process, 10th Edition	General	Self-study	13
Financial Products Training Course, 7th Edition	General	Self-study	7.50
Financial Strategies to Achieve Client Objectives, 2nd Edition, Revised	General	Classroom	4
FINRA Rule 2330: Deferred Variable Annuities	General	Self-study	1
Florida Long-Term Care and Partnership Policies: 8-Hour Course, 3rd Edition	General	Self-study	8
Group Insurance, 7th Edition	General	Self-study	4
Health Insurance Fundamentals	General	Self-study	5
Health Savings Accounts, 3rd Edition	General	Self-study	3.50
ILITs and Estate Planning, 3rd Edition	General	Self-study	1.50
Indexed Products, 2nd Edition	Financial Planning	Self-study	5
Insurance Ethics and Consumer Protection, 2nd Edition [Approved for Insurance Ethics not CFP Ethics]	General	Self-study	1
Introduction to Advanced Markets, 4th Edition	General	Self-study	5
Introduction to Life Insurance, 2nd Edition, 3rd Revision	General	Self-study	5
Introduction to Trusts: Case Studies, 3rd Edition	General	Self-study	4
Investing Retirement Assets, 4th Edition	General	Self-study	2
Know Your Customer and Variable Annuities (FINRA 2330)	General	Self-study	2
Life Concepts, 19th Edition	General	Self-study	11
Life Insurance and Annuities: The Effects of Income and Estate Taxation	General	Classroom	4
Life Insurance Policy Comparison and Underwriting, 3rd Edition	Estate Planning	Self-study	10
Long-Term Care and Partnership Program 4-Hour Refresher Course, 3rd Edition	General	Self-study	3.50
Long-Term Care and Partnership Programs Initial 8-Hour Course, 3rd Edition	General	Self-study	6.50
Long-Term Care Concepts, 5th Edition	General	Self-study	2.50
Long-Term Care Coverage Combined with Annuities and Life Insurance, 2nd Edition	General	Self-study	3
Long-Term Care Suitability, 3rd Edition	General	Self-study	5
Long-Term Care, 6th Edition	General	Self-study	5
Medicare and Medigap Insurance, 11th Edition	General	Self-study	3.50
Medicare Supplement Policies	Health Insurance	Self-study	2

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Course Title	License Type	Delivery Method	Eligible Hours
Medicare, 3rd Edition	General	Self-study	2
Myths and Mysteries of Personal Injury Claims, 2nd Edition	General	Classroom	4.50
Needs Analysis, 4th Edition	General	Self-study	5
New York Suitability and Best Interests in Annuity Transactions	General	Self-study	3
New York Suitability and Best Interests in Life Insurance and Annuity Transactions	General	Self-study	4
New York Suitability and Best Interests in Life Insurance Transactions	General	Self-study	2.50
Principles of Retirement Planning, 7th Edition	General	Self-study	10
Problematic Beneficiary Designations, 3rd Edition	General	Self-study	2.50
Qualified and Nonqualified Plans, 4th Edition	General	Self-study	5
Real Estate Hangover: 4 Steps to Recovery	General	Classroom	4
Retirement Income Strategies, 3rd Edition	General	Self-study	1.50
Retirement Planning Strategies, 1st Edition, Revised	General	Classroom	4
Section 529 Plans, 3rd Edition	General	Self-study	2
Senior Needs Planning, 5th Edition	General	Self-study	5
Social Security and Medicare, 4th Edition	General	Self-study	5
Social Security: Now . . . and the Future? 2nd Edition, 4th Revision	General	Classroom/Webinar	4
Tax and Financial Planning for the Self-Employed	General	Classroom	9.50
Tax Aspects of Homeownership	General	Classroom	4
Tax Cuts and Jobs Act (2017 Tax Reform)	General	Self-study	2
Tax Traps in Life Insurance and Annuities, 1st Edition, Revised	General	Classroom	4
Tax Write-Offs for the Self-Employed, 2nd Edition, Revised	General	Classroom	8
Taxation of Life Insurance and Annuities, 2nd Edition	General	Self-study	2
The New World of Annuities: Where They've Been and Where They're Going	General	Classroom	4
The Tax Impact of Residential Real Estate Investments	General	Classroom	4
To Fall and Rise Again: Life After Financial Crisis	General	Classroom	8
Understanding 1035 Exchanges	General	Self-study	1.50
Understanding Eldercare Financing Options	General	Classroom	4
Understanding Indexed Annuity and Life Insurance Contracts	General	Classroom/Webinar	4
Understanding IRAs - Products, Distributions, and Strategies, 1st Edition, 2nd Revision	General	Classroom/Webinar	4
Understanding IRAs, 5th Edition	General	Self-study	5
Understanding Wills and Intestacy, 2nd Edition	General	Self-study	2
Using Reverse Mortgage as a Proactive Financial Planning Tool	General	Classroom	4
Variable Contracts, 2nd Edition Revised	General	Self-study	5
Variable Contracts: Case Studies, 1st Edition Revised	General	Self-study	3
We're in Probate—Now What?	General	Classroom	4
Wills and Estates of the Rich and Famous	General	Classroom	4

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