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Bookkeeping Guidebook	15
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Goals-Based Investing	5.5
What Advisors Should Know About I.D. Theft	5
Women and Divorce: Financial Aspects (+ CDFA)	Vol I: 3.5; Vol II:5.5
What Advisors Should Know/Psych. of Invest.	7
Advising Couples (Client Communication)	9
Advising Clients Divorcing After 50 (+ CDFA)	9
Child Custody and Support Course (+ CDFA)	9
What Advisors Should Know About Divorce (+ CDFA)	11.5
Executor's Guide	11
Elder Planning	12
Social Security, Medicare, & Government Pensions	13.5
Asset Allocation -Gibson	14
Essential Guide to Divorce for Advisors (+ CDFA)	14
Natalie Choate: Planning for Retirement Benefits	23.5
Private Wealth Management - Hallman/Rosenbloom	28

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idfa Institute for Divorce Financial Analysts
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Health Savings Accounts	1	1.5
Business Valuation	2	3
Personal Life Insurance Planning	2.5	4
Individual Retirement Accounts	4	5.5
Long-Term Care Planning	4.5	5.5
Completre Divorce Guide (+ CDFA)	7	-
Principles of Wealth Management	7	9
Interpretation of Financial Statements	7.5	11

Long Financial Planning Courses

Course	CFP®	CPA
Facilitating Financial Health	11	-
Advisor's Guide to Estate Planning	21	29
Advisor's Guide to Investment Planning	28	36
Private Wealth Mgt - Hallman/Rosenbloom	28	

Short Tax Courses (Updated Annually)

Course	CFP®	CPA	IRS
199A Pass-Through Deduction	-	3	3
Auto Rules	-	2	2
Bankruptcy (Tax Guide)	-	2	2
Business Travel & Entertainment	-	2	2
Business Expenses (Tax Guide)	-	2	2
Compensation & Benefits (Tax Guide)	2	3.5	3
Coronavirus and CARES Tax Summary	1.5	3	3
Divorce Transfers & Settlemts (+ CDFA)	2	2	2
Earned Income Credit	-	4	4
Education Tax Benefits	3.5	5	5
Estate, Gift, Generation-Skipping Transf		8	8
Estate Planning (Tax Guide)	-	2	2
Estate Tax Planning	3	4	4
Family Tax Planning	2	2	2
Federal Income Tax Changes	4.5	6	6
Federal Income Tax Update	5.5	9	9
Gift Taxes	-	3	3
Home Office Deduction	2	3	3
Information Security: Basic Safeguards	4.5	6	6
Information Security: Networks		8	8
Information Security: Malware		6	6
Individual Retirement Plans-Tax	-	3	3
Keeping Taxpayer Data Secure	2	2.5	2
Passthrough Business Deduction	1	2	2
Retirement Planning (Tax Guide)		3	3
Retirement Plans, Pensions,Annuities	2	3	3
Tax Guide S-Corporations	-	3	3
Tax Treatment Individual Retirement Plans	-	2.5	2
Tax Treatment of Virtual Currency	1.5	1.5	1

Long Tax Courses (Updated Annually)

Course	CFP®	CPA	IRS
Annual Tax Season Update 2023	-	8	8
Asset Protection Tax Strategies	12	17.5	17
Comprehensive Family Tax Planning	-	24	24
Comprehensive Tax Course: Ret.Plan.	22	31.5	31
Corporate Tax Planning	-	21	21
Divorce Tax Planning (+ CDFA)	10	16	16
Estate Planning: Tax Strategies	12.5	20	20
Financial Planning:Tax Strategies	10	14.5	14
Guide to Federal Indiv & Corp. Tax.	24.5	35.5	35
Partnership Taxation	7.5	13.5	13
Passive Losses	-	10.5	10
Real Estate Tax Planning	7.5	11	11
Retirement Planning: Tax Strategies	12	17.5	17
Small Business Tax Planning	19	24.5	24
1040 Workshop	20	28	28

We report CFP® and IRS credits.

Q4

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