BEACON HILL FINANCIAL EDUCATORS

BEACON HILL CFP® Self-Study Courses

Suggested Credit Allocation for
NAPFA CE Subject Areas
For more information: http://www.napfa.org/membership/CEGuidelines.asp

Order online or by phone 800-588-7039 www.bhfe.com

Course #	1001	1947	2960	2958	2953	290115	1421	490115	4960	194015	4924	491015	290215	1948	491115	210315	491515	490515	491915	210915	2105	1941	290815	230415
Download Price	$39	-	-	$149	$75	$49	-	$119	$139	-	$35	$109	$39	-	$119	$49	$39	$99	$139	$49	$39	-	$49	$49
Print Price (+ S & H)	$44	$109	$179	$199	$99	$59	$139	$149	$179	$89	$45	$139	$49	$129	$149	$59	$49	$129	$179	$59	$49	$89	$59	$59
BHFE COURSES: → **NAPFA 2 yr Requrement:** **1/1/14 thru 12/31/15** **60 credit hours overall:** **32 hrs in Core subjects including 2 in ethics (min. 5, max 15 per area);** **+ 28 in Core *or* Electives.** **CORE SUBJECTS:** ↓	**CFP Board Ethics**	**Advising Couples**	**Advisors Guide to Estate Planning**	**Advisor's Guide to Investment Planning**	**Advisor's Guide to Planning for the Baby Boomer Client**	**Annuities Update**	**Asset Allocation**	**Asset Protection Tax Strategies**	**Comprehensive Tax Course: Retirement Planning**	**Conserving Client Portfolios During Retirement**	**Divorce Transfers & Settlements**	**Divorce Tax Planning**	**Disability Insurance**	**Elder Planning**	**Estate Planning Tax Strategies**	**Estate Tax Update**	**Family Tax Issues**	**Financial Planning Tax Strategies**	**Guide to Federal Individual and Corporate Taxation**	**Health Care Reform: Overview**	**IRAs Update**	**Life Planning: The Kinder Method™**	**Long-Term Care Update**	**Life Insurance Update**
Insurance & Risk Mgt													2.5										2	4
Investments				28		4.5	14																	
Income Tax Planning								6	10		1	5			6	2	2	5	20					
Retirement Planning & Employee Benefits					7				10	6				6							3.5		2	
Estate Planning			20												6	2								
Communications		5																				6		
Ethics	2																							
NAPFA ELECTIVES:	**See all our courses at www.bhfe.com**																							
Financial Planning Process		4						6				5		6				4		3				
Acctg./Cash Fl./Budgeting	See our 20+ accounting and auditing courses at www.bhfe.com																							
Econ./Political Environment																								
Mktg & Practice Mgt	See our finance, QuickBooks, Excel, and other courses at www.bhfe.com																							
Strategic Thinking																								
Technology																								
# Credits, Core	2	5	20	28	7	4.5	14	6	20	6	1	5	2.5	6	12	4	2	5	20	0	3.5	6	4	4
# Credits, Elective	0	4	0	0	0	0	0	6	0	0	0	5	0	6	0	0	0	4	0	3	0	0	0	0
Total CFP® CE	**2**	**9**	**20**	**28**	**7**	**4.5**	**14**	**12**	**20**	**6**	**1**	**10**	**2.5**	**12**	**12**	**4**	**2**	**9**	**20**	**3**	**3.5**	**6**	**4**	**4**
CPA CPE (QAS Self-Study)	3		31	44		7.5		17.5	31.5		2	14.5			20	4.5	2.5	14.5	34.5	6	4.5	6	6	6
EA, Tax Preparer, ERPA CE								17	31		2	14			20	4	2	14	34					
Order 3 or more courses and receive an automatic 18% discount!	**CFP Board Ethics**	**Advising Couples**	**Advisors Guide to Estate Planning**	**Advisor's Guide to Investment Planning**	**Advisor's Guide to Planning for the Baby Boomer Client**	**Annuities Update**	**Asset Allocation**	**Asset Protection Tax Strategies**	**Comprehensive Tax Course: Retirement Planning**	**Conserving Client Portfolios During Retirement**	**Divorce Transfers & Settlements**	**Divorce Tax Planning**	**Disability Insurance**	**Elder Planning**	**Estate Planning Tax Strategies**	**Estate Tax Planning**	**Family Tax Issues**	**Financial Planning Tax Strategies**	**Guide to Federal Individual and Corporate Taxation**	**Health Care Reform: Overview**	**IRA Update**	**Life Planning: The Kinder Method™**	**Long-Term Care Update**	**Life Insurance Update**

Beacon Hill Financial Educators
51A Middle Street
Newburyport, MA 01950
E-mail: contact@bhfe.com
800-588-7039

Order online
or by phone:
www.beaconhillcpe.com
800-588-7039

Course #	1117	1942	490815	495915	495315	1908	496615	4218	4902	491615	4904	491315	4906	4921	4209	1945	1943	2985	193915	2975	1936	1946	1950
Download Price	-	-	$99	$119	$129	-	$139	$39	$39	$39	$39	$39	$39	$29	$39	-	-	$39	-	$39	-	-	-
Print Price (+ S & H)	$159	$189	$119	$149	$169	$109	$179	$49	$49	$49	$49	$49	$49	$39	$49	$129	$119	$49	$59	$49	$109	$139	$129
BHFE COURSES: → **NAPFA 2 yr Requrement:** **1/1/14 thru 12/31/15** **60 credit hours overall:** **32 hrs in Core subjects including** **2 in ethics** **(min. 5, max 15 per area);** **+ 28 in Core *or* Electives.** **(see www.NAPFA.org)** **CORE SUBJECTS:** ↓	**Planning for Retirement Benefits**	**Private Wealth Management**	**Real Estate Tax Planning**	**Retirement Planning Tax Strategies**	**Small Business Tax Planning**	**Social Security, Medicare, and Government Plans**	**1040 Workshop**	**2015 Tax Overview**	**Tax Guide to Asset Protection**	**Tax Guide to Bankruptcy**	**Tax Guide to Compensation & Benefits**	**Tax Guide to Education Planning**	**Tax Guide to Financial Planning**	**Tax Guide: Affordable Care Act**	**Tax Guide to Retirement Planning**	**What Advisors Should Know: Business Buyout Agreements**	**What Advisors Should Know About Divorce**	**What Advisors Should Know About ETFs**	**What Advisors Should Know About Identity Theft**	**What Advisor's Should Know About Mutual Funds**	**What Advisors Should Know: About the Psych. of Investing**	**What Advisors Shold Know About Selling a Business**	**What Advisors Should Know About Fundamental Analysis**
Insurance & Risk Mgt		5																					
Investments		6																2		2	2	7	10
Income Tax Planning	8	3	6	6	10		20	2	1	1.5	1	1.5	1	1	1								
Retirement Planning & Employee Benefits	8	5		6		11					1				1								
Estate Planning		8																					
Communications																					2		
Ethics																							
Electives:																							
Financial Planning Process		1	2		2				1				1			12	10		5			7	
Acctg./Cash Fl./Budgeting	See our 20+ accounting and auditing courses at www.bhfe.com																						
Econ./Political Environment																							
Mktg & Practice Mgt	See our finance, QuickBooks, Excel, and other courses at www.bhfe.com																						
Strategic Thinking																							
Technology																							
# Credits, Core	16	27	6	12	10	11	20	2	1	1.5	2	1.5	1	1	2	0	0	2	0	2	4	7	10
# Credits, Elective	0	1	2	0	2	0	0	0	1	0	0	0	1	0	0	12	10	0	5	0	0	7	0
Total CFP® CE	**16**	**28**	**8**	**12**	**12**	**11**	**20**	**2**	**2**	**1.5**	**2**	**1.5**	**2**	**1**	**2**	**12**	**10**	**2**	**5**	**2**	**4**	**14**	**10**
CPA CPE (QAS Self-Study)			11	17	24		29.5	3	2.5	2.5	3	2.5	2	1.5	2		3	3		3			
EA, Return Preparer, ERPA CE			11	17	24		29	3	2	2	3	2	2	1	2								
Each course comes with an e-Exam for Instant Online Grading	**Planning for Retirement Benefits**	**Private Wealth Management**	**Real Estate Tax Planning**	**Retirement Planning Tax Strategies**	**Small Business Tax Planning**	**Social Security, Medicare, and Government Plans**	**1040 Workshop**	**(Current Year) Tax Overview**	**Tax Guide to Asset Protection**	**Tax Guide to Bankruptcy**	**Tax Guide to Compensation and Benefits**	**Tax Guide to Education Planning**	**Tax Guide to Financial Planning**	**Tax Guide to the Affordable Care Act**	**Tax Guide to Retirement Planning**	**What Advisors Should Know: Bus. Buyout Agrmts**	**What Advisors Should Know About Divorce**	**What Advisors Should Know About ETFs**	**What Advisors Should Know About Identity Theft**	**What Advisor's Should Know About Mutual Funds**	**What Advisors Should Know: Psych. of Investing**	**What Advisors Shold Know About Selling a Business**	**What Advisors Should Know: Fundamental Analysis**

For a complete course list:
www.bhfe.com

State CPA Ethics Courses:
AZ, AR, CA, CO, CT, DE, DC, FL, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, MT, NE, NV, NH, NC, NM, NY, OH, OK, OR, PA, RI, TN, TX, VT, VA, WA, WV.

Also Available:
Accounting, Auditing, QuickBooks, Excel.

IRS APPROVED CONTINUING EDUCATION PROVIDER

IRS-registered courses:
Ethics for Tax Professionals, Federal Income Tax Changes, Annual Federal Tax Refresher, Retirement Plans, Pensions, and Annuities, Individual Retirement Arrangements, Life Insurance Proceeds.

See complete list at: www.bhfe.com.