

Individual Submission of CFP[®] Continuing Education Hours

Section I Instructions for Individual Submission of CFP[®] Continuing Education Hours

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Instructions for Individual Submission of CFP® Continuing Education Hours

Participants having obtained their CFP® designation have the ability to use Greene Consulting's SkillMark® courses for Continuing Education credits. Students training on Greene's training platform can use Greene Consulting's proprietary electronic reporting system to automatically send all course completions directly to the CFP Board on a monthly basis.

For those participants not able to use the electronic CE submission system, Greene Consulting has outlined detailed instructions for manual submission of CE hours to the CFP Board (due to preference or using training platforms within company Intranets).

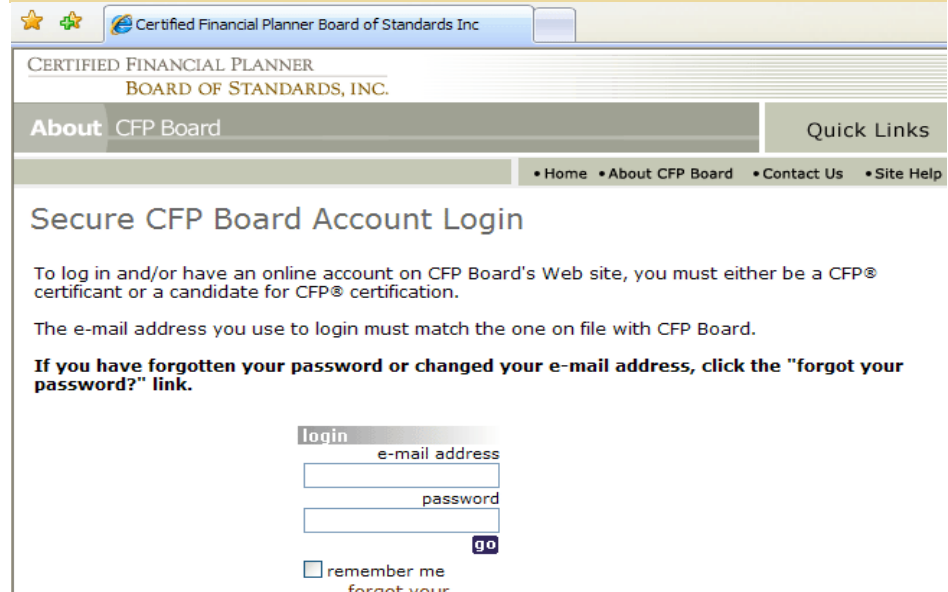
Please use the following documentation as a guide to assist in having your hours with the CFP Board of Standards.

1. STEP ONE: LOGIN TO THE CFP WEBSITE WITH YOUR REGISTRANT ID

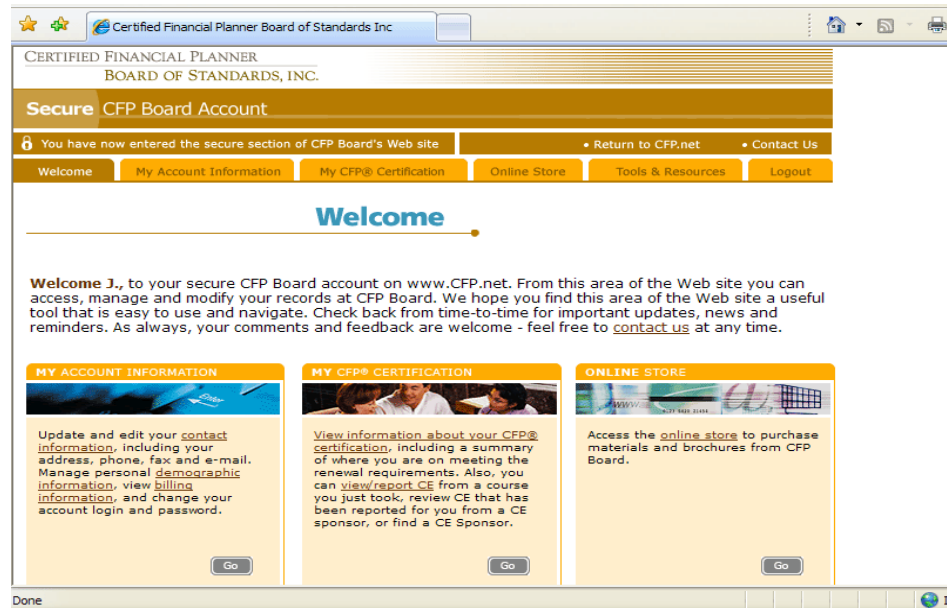
Visit the Website <http://www.cfp.net/login>



2. ENTER YOUR EMAIL ADDRESS AND PASSWORD THEN CLICK "GO"



3. UNDER THE SECTION, "MY CFP® CERTIFICATION," CLICK THE "VIEW/REPORT CE" LINK



4. CLICK THE "REPORT CE" BUTTON TO ACCESS THE CE SPONSOR LOOKUP

CERTIFIED FINANCIAL PLANNER
BOARD OF STANDARDS, INC.

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Continuing Education (CE) Summary & Review

Below are the CE hours that have been reported to CFP Board as of 1/22/2007. Please review this list to verify that the information is correct. The status indicates which programs were accepted, which were denied, which are pending review by CFP Board, which have had additional information requested, and which were not reviewed because the CE requirement has already been met. If you have new CE hours to report, click the "Report CE" button.

» MY CE PROFILE

CFP® certificants must complete the required number of CE hours each reporting period, including 2 hours from a CFP Board-approved program on CFP Board's *Code of Ethics Professional and Responsibility (Code of Ethics)* and/or *Financial Planning Practice Standards (Practice Standards)*.

Current CE Period:	03/01/2006 - 02/28/2008
Total CE Hours Required:	30.00
Total CE Hours Accepted:	5.00
Balance of CE Hours Remaining:	25.00
Hours Pending Review:	0
Code of Ethics/Practice Standards CE Requirement Met:	No

Report CE

» CONTINUING EDUCATION (CE) SUMMARY

Program Date	Sponsor Name	Program / Class Name	Hours Accepted	Status	How Reported	Date Reported
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5. IN THE CE SPONSOR LOOKUP, SEARCH FOR "GREENE CONSULTING" AS THE CE SPONSOR

Certified Financial Planner Board of Standards Inc

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Report Continuing Education

CE Sponsor Lookup CE Program Lookup Report CE Confirmation

» CE SPONSOR LOOKUP

An increasing number of CE sponsors register their programs with CFP Board. If you have taken CE from one of these sponsors, you should be able to find them by using the search option. For best results, choose one or two distinguishable keywords from the CE sponsor's name, omitting common words such as "a," "an" or "the."

You may report completion of a professional license or designation examination that CFP Board accepts for CE credit by entering the keywords "Designations & Licenses" in the search option below and selecting the appropriate license or designation from the resulting list.

Search for a CE Sponsor:
You must click the "Go" button to proceed. Hitting your "Enter" key will only refresh this page.

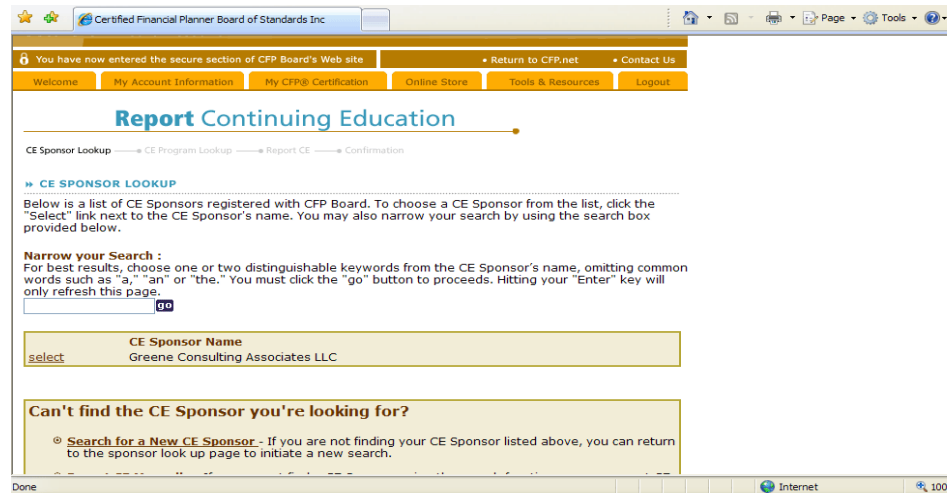
Greene Consulting

CFP® CERTIFIED FINANCIAL PLANNER™ CFP®
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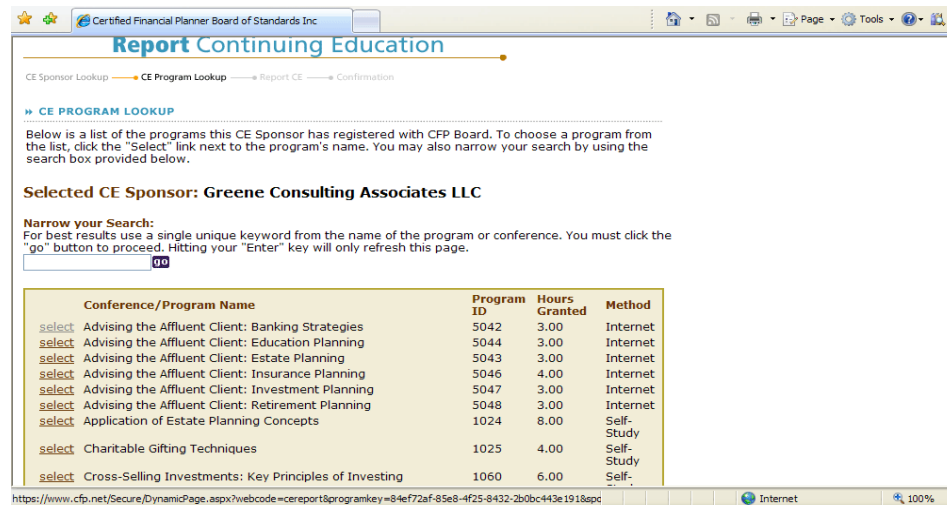
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Done Internet

6. UPON SEARCH, SELECT "GREENE CONSULTING ASSOCIATES LLC" AS THE CE SPONSOR



7. SCROLL THROUGH THE LIST OF COURSES AND CLICK THE "SELECT" BUTTON FOR THE GIVEN COURSE FOR WHICH HOURS ARE BEING SUBMITTED



8. COMPLETE THE APPROPRIATE FIELDS OF INFORMATION AND CLICK THE “REPORT CE” BUTTON TO ADD THE COURSE TO THE LIST OF PROGRAMS FOR YOUR CE REPORTING PERIOD

The screenshot shows the top portion of a web browser window displaying the 'Report Continuing Education' page. The browser's address bar shows 'Certified Financial Planner Board of Standards Inc'. The page title is 'Report Continuing Education'. Below the title is a breadcrumb trail: 'CE Sponsor Lookup' → 'CE Program Lookup' → 'Report CE' → 'Confirmation'. A blue arrow points to the 'REPORT CONTINUING EDUCATION' section. A paragraph of text reads: 'Please verify the following information for the program you are reporting. Clicking the "Report CE" button will add the program to the list of programs for your CE reporting period.' The form is divided into three sections: 'CE Sponsor Information (Required)', 'Program Information (Required)', and 'Hours Granted (Required)'. The 'CE Sponsor Information' section contains 'CE Sponsor Name: Greene Consulting Associates LLC' and 'CE Sponsor ID No: 1741'. The 'Program Information' section contains 'Program Name: Wills, Estates and the Probate Process', 'Method of Delivery: Self-Study', and 'Program ID No: 1021'. A note next to the method of delivery states: 'CE hours from teaching experience may not exceed 50% of the total CE hours required for any reporting period.' The 'Hours Granted' section contains a paragraph of text and a table with two columns: 'Topic' and 'Hours Granted'. The table has two rows: 'Code of Ethics / Practice Standards:' with a value of '0', and 'Principles of Financial Planning:' with a value of '0'. The browser's status bar at the bottom shows 'Done' and 'Internet' with a 100% zoom level.

The screenshot shows the bottom portion of the 'Report Continuing Education' page. A warning box at the top states: 'Please note that this program may be accepted by other organizations for a different number of hours than those accepted by CFP Board. You may not increase the number of hours accepted by CFP Board or change the topics.' Below this is the 'Date Completed (Required)' section, which asks the user to 'Enter the date you completed this program as mm/dd/yyyy:' and provides a date input field. A checkbox is present with the text: 'I affirm that this submission is true, accurate and complete to the best of my knowledge. I understand that CFP Board has the right to audit this CE Program and I agree to provide CFP Board with further information and/or documents regarding this program upon request.' Below the checkbox is a prominent orange 'Report CE' button. A section titled 'Not the correct program?' contains two radio button options: 'Find a Different Program for this Sponsor - If this is not the correct program, you can return to the list of all programs for this CE Sponsor.' and 'Search for a New CE Sponsor - - If this is not the correct program or CE Sponsor, you can return to the CE Sponsor search page.' At the bottom of the page is a footer containing the CFP logo, 'CERTIFIED FINANCIAL PLANNER™', 'CFP®', and copyright information: 'Copyright © 2005, Certified Financial Planner Board of Standards Inc. All rights reserved. Copyright, Privacy Policy and Legal Information'. The browser's status bar at the bottom shows 'Done' and 'Internet' with a 100% zoom level.