

# Individual Submission of CFP<sup>®</sup> Continuing Education Hours

---

## **Section I** Instructions for Individual Submission of CFP<sup>®</sup> Continuing Education Hours

## Section I

# 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).

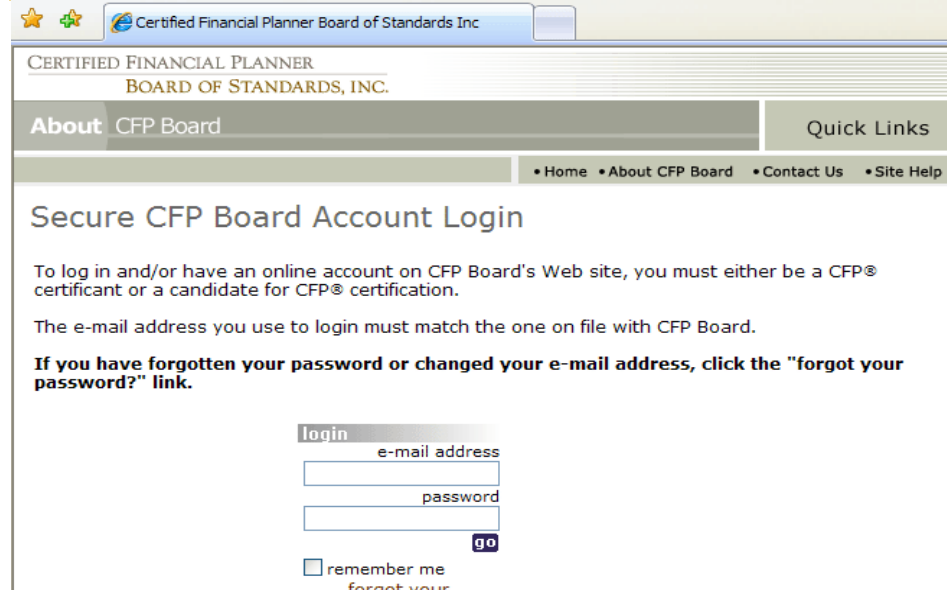
Please use the following documentation as a guide to assist in having your hours with the CFP Board of Standards.

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

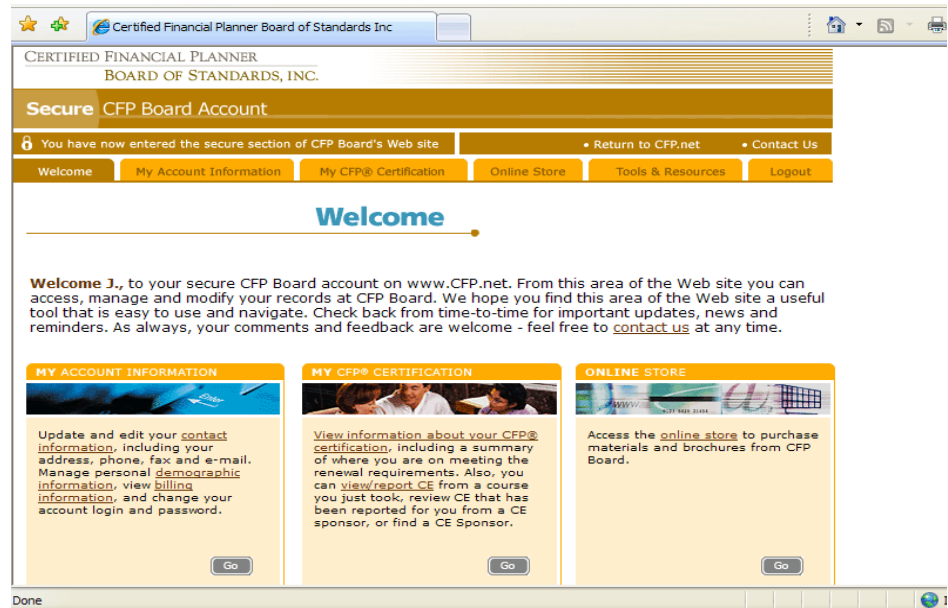
Visit the Website <http://www.cfp.net/login>



**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.

Secure CFP Board Account

You have now entered the secure section of CFP Board's Web site | Return to CFP.net | Contact Us

Welcome | My Account Information | My CFP® Certification | Online Store | Tools & Resources | Logout

### 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
--------------	--------------	----------------------	----------------	--------	--------------	---------------

**5. IN THE CE SPONSOR LOOKUP, SEARCH FOR "GREENE CONSULTING" AS THE CE SPONSOR**

Certified Financial Planner Board of Standards Inc

Secure CFP Board Account

You have now entered the secure section of CFP Board's Web site | Return to CFP.net | Contact Us

Welcome | My Account Information | My CFP® Certification | Online Store | Tools & Resources | Logout

### 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.

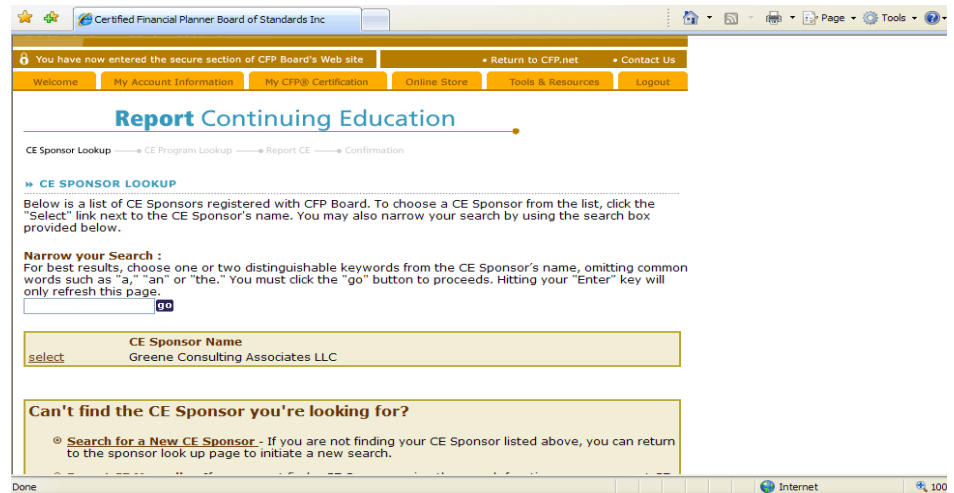
Greene Consulting

CFP® CERTIFIED FINANCIAL PLANNER™ CFP®  
The certification marks above are owned by Certified Financial Planner Board of Standards Inc. and are licensed to individuals who successfully complete CFP Board's initial and ongoing certification requirements.

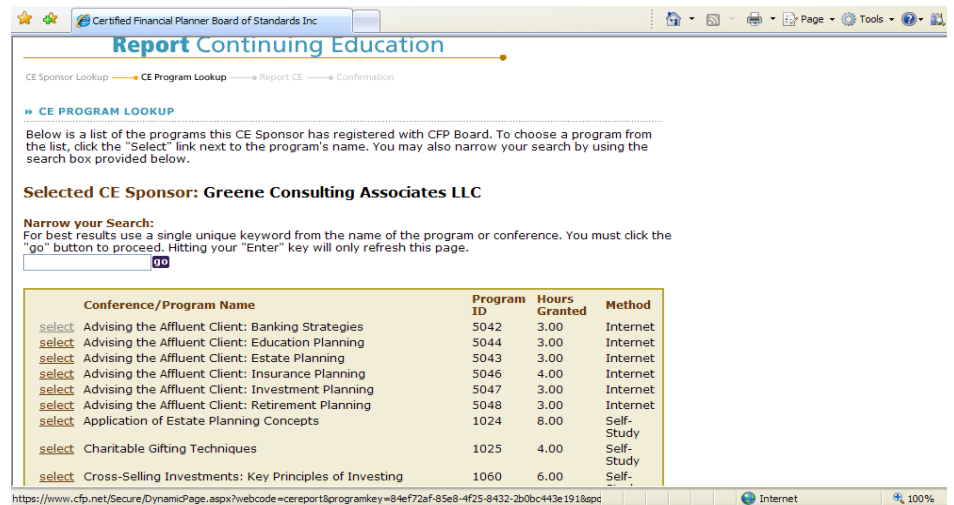
Copyright © 2005, Certified Financial Planner Board of Standards Inc. All rights reserved. [Copyright](#), [Privacy Policy](#) and [Legal Information](#)

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**

**Report Continuing Education**

CE Sponsor Lookup → CE Program Lookup → **Report CE** → Confirmation

▶ **REPORT CONTINUING EDUCATION**

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.

**CE Sponsor Information (Required)**

CE Sponsor Name: Greene Consulting Associates LLC  
 CE Sponsor ID No: 1741

**Program Information (Required)**

Program Name: Wills, Estates and the Probate Process  
 Method of Delivery: Self-Study  
 Program ID No: 1021

CE hours from teaching experience may not exceed 50% of the total CE hours required for any reporting period.

**Hours Granted (Required)**

Please verify the hours granted for the program you are reporting, listing the hours according to the relevant topic. If you only completed a portion of the program, you should reduce the number of hours reported.

Topic	Hours Granted:
Code of Ethics / Practice Standards:	<input type="text" value="0"/>
Principles of Financial Planning:	<input type="text" value="0"/>

These notes and the 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.

**Date Completed (Required)**

Enter the date you completed this program as mm/dd/yyyy:

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.

**Report CE**

**Not the correct program?**

- 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.
- 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.

CFP® CERTIFIED FINANCIAL PLANNER™ CFP® Copyright © 2005, Certified Financial Planner Board of Standards Inc. All rights reserved. [Copyright, Privacy Policy and Legal Information](#)