

Designation	Acronym	Issuing Organization	Accredited By	Qualifications	Continuing Education and License Renewal Requirements	Complaint Process Available (Y/N)	Allianz Approved (Y/N)
Accredited Advisor in Insurance	AAI	The Institutes	N/A	Three self-study courses and an ethics course, no required exam, no continuing education requirement	None	N	
Accredited Asset Management Specialist	AAMS	College for Financial Planning	North Central Association	Completion of AAMS course and final exam at a testing center	16 hours every two years; designation renewal every two years	Y	Y
Accredited Domestic Partnership Advisor	ADPA	College for Financial Planning	North Central Association	Candidates must currently hold one of the following designations or certifications: CRPC, AAMS, AWMA, APMA, CIMMA, ChFC, JD, CPA, CFA, CTFA or CFP. Completion of a proctored, closed-book final exam.	16 hours every two years	Y	
Accredited Estate Planner	AEP	National Association of Estate Planners & Councils	N/A	Candidates must meet ALL of the following: 1. Must have JD, CPA, CLU/ChFC, CFP or CTFA 2. Must be in good standing with their professional organization 3. Must have a minimum of five years' experience in estate planning in one of the above prerequisite professions	30 hours every two years, including 15 hours in estate planning; designation renewal annually	Y	Y
Accredited Financial Counselor	AFC	Association for Financial Counseling and Planning Education	N/A	Candidates must have 1000 hours of financial counseling experience and provide three letters of reference. Two self-study courses each 100-150 hours with a proctored final exam for each course	30 hours every two years	N	
Accredited Investment Fiduciary	AIF	Center for Fiduciary Studies	N/A	Completion of either a web-based program or a Capstone program. Closed book, proctored final exam	Six hours per year	N	
Accredited Investment Fiduciary Analyst	AIFA	Center for Fiduciary Studies	N/A	Three day in-person class and closed book final exam	10 hours per year	Y	
Accredited Pension Representative	APR	National Institute of Pension Administrators	N/A	Candidate must meet one of the following requirements: 1. Hold an Enrolled Retirement Plan Agent designation 2. Hold an insurance license, or 3. Hold either a FINRA Series 6, 7, 65, 66 or 24 license  Two self-study courses and completion of a final exam	10 hours each year	N	
Accredited Portfolio Management Advisor	APMA	College for Financial Planning	U.S. Department of Education Regional Accredited Agencies, North Central Association of Colleges and Schools, The Higher Learning Commission	11-module course (100-150 hours) focusing on program concepts and 100-150 hours online instructor-led graduate course involving direct application of program topics. Completion of final online, closed-book proctored exam	16 hours every other year	Y	Y
Accredited Retirement Plan Consultant	ARPC	Society of Professional Asset Managers and Record Keepers	National Commission for Certifying Agencies	One year of full-time industry experience and letter or recommendation from current work supervisor. This designation does not require any education requirements but does require a final online, closed-book proctored exam	10 hours annually	N	
Accredited Tax Advisor	ATA	Accreditation Council for Accountancy and Taxation	N/A	Five years' experience in tax preparation, compliance, tax planning and consulting, of which 40 percent must be in tax planning and consulting. Completion of online, closed-book, proctored ATA exam	30 hours per year or 90 hours within three years	Y	Y
Accredited Tax Preparer	ATP	Accreditation Council for Accountancy and Taxation	N/A	Three years of work experience in tax preparation, two of which may be satisfied through college credit and completion of online, closed-book, proctored ATP exam	24 hours per year or 72 hours within three years	Y	
Accredited Wealth Management Advisor	AWMA	College for Financial Planning	North Central Association	Completion of a final exam at a testing center	16 hours every two years	Y	Y
Associate in General Insurance	AINS	The Institutes	N/A	Three courses in the Program of General Insurance and completion of an ethics exam OR, two courses in Program of General Insurance, completion of an elective course and earn and completion of an ethics exam.	N/A	N	
Associate in Insurance Services	AIS	The Institutes	N/A	Passing AIS 25 Exam and completion of on elective option including, but not limited to, Accredited Advisor in Insurance Program, Associate in Claims Program, Association in Risk Management Program.	N/A	N	

Associate in Personal Insurance	API	The Institutes	N/A	Completion of one of the following: 1. API 28, API 29, INS 21 AND INS22 2. API 28, CPCU 555 AND CPCU 556  as well as completion of final course examinations	N/A	N	
Associate, Financial Services Institute	AFSI	LOMA	N/A	Completion of five LOMA courses and completion of proctored exams	N/A	N	
Associate, Life Management Institute	ALMI	LOMA	N/A	Completion of five LOMA courses and completion of proctored final exams in three of the five courses	N/A	N	
Board Certified in Estate Planning	BCE	Institute of Business & Finance	N/A	Designation is no longer offered but is still supported by the Institute of Business & Finance	N/A	N/A	Y
Certificate in Investment Performance Measurement	CIPM	CFA Institute	N/A	Two years of professional experience entailing performance-related activities, or four years of professional experience in the investment industry primarily consisting of evaluating finances, marketing investment management services, evaluating investment managers, etc. Completion of two, three-hour, closed-book proctored exams	45 hours every three years	Y	
Certified 401(k) Professional	C(k)P	The Retirement Advisor University at UCLA Anderson School of Management Executive Education	N/A	Candidate must meet all of the following requirements: 1. Three years' experience in financial services 2. 10 defined contribution plans under management 3. \$30,000,000 in AUM  as well as approximately 142 hours of coursework and an online, proctored final exam for each course	24 hours every two years	N	
Certified Annuity Specialist	CAS	Institute of Business & Finance	N/A	Candidate must have a bachelor's degree or 2,000 hours of financial services work experience. Completion of six self-study program modules, three exams and a case study	30 hours every two years	Y	Y
Certified AML Specialist	CAMLS	International Association of Financial Management (INTERFIMA)	N/A	Three years' experience in the financial services industry OR either an undergraduate or graduate degree in Finance, Economics, Business or Law from an accredited institution. Completion of five modules of related subject matter (32-40 required in-class) and closed-book, proctored final exam	15 hours every two years	N	
Certified Anti-Money Laundering Specialist	CAMS	Association of Certified Anti-Money Laundering Specialists (ACAMS)	N/A	40 qualifying credits based on education, other professional certification and professional experience and a passing grade on the closed-book, proctored CAMS Exam.	60 credits every three years	N	
Certified Asset Protection Planner	CAPP	The Wealth Preservation Institute	N/A	16-part CAPP course, online or in person and completion of an open-book, online final exam	18 hours every two years and open-book recertification exam every three years	Y	
Certified College Planning Specialist	CCPS	National Institute of Certified College Planners	N/A	Three 30 minute on-line exams with only 40 questions, exam passing score of 70% (80% is preferred) and issuing organization is not accredited	24 hours annually	N	N
Certified Credit Counselor	CCC	National Association of Certified Credit Counselors	N/A	Only requirement is passage of an online, proctored certification exam	16 hours every two years	N	
Certified Compliance Specialist	CCOS	International Association of Financial Management (INTERFIMA)	N/A	Three years' experience in the financial services industry OR either an undergraduate or graduate degree in Finance, Economics, Business or Law from an accredited institution. Completion of five modules of related subject matter (32-40 required in-class) and closed-book, proctored final exam	15 hours every two years	N	
Certified Divorce Financial Analyst	CDFA	The Institute for Divorce Financial Analysts	N/A	Three years of experience in the financial services field, accounting or family law. Self-study course followed by a computer exam after module three and an open-book case study exam after module four	15 hours specific to divorce every two years	Y	Y
Certified Educator in Personal Finance	CEPF	<a href="http://Fincert.org">Fincert.org</a>	N/A	Six months relevant experience, high school diploma or GED and meets Candidate Fitness Standards. Completion of a self-study program and online, proctored final exam	16 hours every two years	Y	

Certified Employee Benefits Specialist	CEBS	International Foundation of Employee Benefit Plans and Wharton School of the University of Pennsylvania	N/A	Six required courses and two electives from the CEBS curriculum. All courses followed by computer-based test	30 hours every two years	N	N
Certified Estate and Trust Specialist	CES	National Institute of Certified Estate Planners	N/A	Valid current license in the professional of finance, legal or tax, or receive permission based on some other relevant professional interest. Combination of eight modules (online and self-study) and completion of a proctored exam	Eight hours every two years in the area of estate planning	Y	Y
Certified Exit Planner	CExP	Business Enterprise Institute	N/A	Hold either a CPA, JD, CFP, CLU, CFA or MBA designation and attend an introductory two-day training program. 100-120 hours self-study coursework, 10 online course exams and two written exams	30 hours every two years	Y	
Certified Exit Planning Advisor	CEPA	Exit Planning Institute	N/A	Candidate must have five years full-time experience working directly with business owners as an attorney, CPA, business broker, investment banker, commercial lender, estate planner, insurance professional or business consultant, complete a five day educational program and closed-book, proctored final exam	40 hours every three years	Y	
Certified Financial Consultant	CFC	Institute of Financial Consultants	N/A	Completion of five online modules and online certification exam	20 hours (frequency not specified)	N	
Certified Financial Educator	CFEd	Heartland Institute of Financial Education	N/A	Three years' experience in financial services industry and teaching/training experience. Completion of self-study CFE course and online certification exam	12 hours annually	Y	
Certified Financial Marketing Professional	CFMP	American Bankers Association	N/A	Candidates must have an MBA or other advanced marketing degree or complete one of three ICB-approved financial services marketing programs. Candidates must have five years' experience in financial services marketing and one letter of recommendation. Completion of online, proctored certification exam	35 credits every three years	N	
Certified Financial Planner	CFP	Certified Financial Planner Board of Standards, Inc.	National Commission for Certifying Agencies	Bachelor's degree (or higher) from an accredited college or university and three years of full-time personal financial planning experience or the equivalent part-time experience (2,000 equals one year full-time experience). Completion of a CFP-board registered program and hold one of the following: CPA, ChFC, CLU, CFA, Ph.D. in business/economics, Doctor of Business Administration or attorney's license as well as completion of a final certification examination	30 hours every two years	Y	Y
Certified Financial Wellness Educator	CFWE	Foundation for Financial Wellness	N/A	Completion of the Financial Wellness Certified Trainer program and non-proctored online exam	Four Financial Wellness courses annually	N	
Certified Fund Specialist	CFS	Institute of Business & Finance	N/A	Candidate must have a bachelor's degree or 2,000 hours of financial services work experience. Completion of six self-study program modules, three exams and a case study	30 hours every two years	Y	Y
Certified in Long Term Care	CLTC	The CLTC Board of Standards, Inc.	N/A	Two day class or online course as well as completion of a final course exam	Completion of ethics course every two years	N	N
Certified IRA Services Professional	CISP	American Bankers Association	N/A	Candidates must complete two years of dedicated IRA operational and technical experience, one of four ICB approved educational programs, provide one letter attesting to qualifications for certification including IRA experience and complete an online proctored final certification exam	24 credits every three years	N	
Certified Income Specialist	CIS	Institute of Business & Finance	N/A	Bachelor's degree or 2,000 hours of financial services work experience, completion of a six-module self-study program, three online proctored exams and one case study	30 hours every two years	Y	Y
Certified Insurance Service Representative	CISR	Insurance Agents & Brokers Group	N/A	Completion of five courses and one final exam for each course	One session every year	N	
Certified Investment Management Analyst	CIMA	Investment Management Consultants Association	American National Standards Institute	Three years of financial services experience and a satisfactory record of ethical conduct (determined by IMCA's Admissions Committee). Completion of classroom program provided by an IMCA registered education provider and an online proctored qualification exam and certification exam	40 hours every two years	Y	Y

Certified Merger and Acquisition Advisor	CMAA	Alliance of Merger and Acquisition Advisors	N/A	Hold a Ph.D., J.D. or M.B.A. or a college degree from an accredited institute and hold one of the following: CPA, CFP, CMA, CVA, CBI, CBA, CBF, PFS, CBC, CFE, ABV, CFM, CIA, AVA. Completion of 36 hours of AM&AA (Issuing Organization) courses and final online, proctored exam	12 credits per year AND attend at least one AM&AA annual conference every three years	N	
Certified Pension Consultant	CPC	American Society of Pension Professionals & Actuaries	N/A	Candidate must have three years of retirement plan experience and complete seven ASPPA exams	40 credit hours every two years	N	
Certified Personal Banker	CPB	American Bankers Association	N/A	Candidate must have six months experience as a personal banker and complete the American Institute of Banking Personal Banker Certificate. Candidate must also provide a letter of recommendation from a senior manager and pass and online, proctored final certification exam	Nine hours every three years	N	
Certified Personal Finance Counselor	CPFC	<a href="http://Fincert.org">Fincert.org</a>	N/A	Six months relevant experience, high school diploma or GED and meets Candidate Fitness Standards. Completion of a self-study program and online, proctored final exam	16 hours every two years	Y	
Certified Portfolio Specialist	CPS	International Association of Financial Management (INTERFIMA)	N/A	Three years' experience in the financial services industry OR either an undergraduate or graduate degree in Finance, Economics, Business or Law from an accredited institution. Completion of five modules of related subject matter (32-40 required in-class) and closed-book, proctored final exam	15 hours every two years	N	
Certified Private Wealth Advisor	CPWA	Investment Management Consultants Association	N/A	Candidate must have a bachelor's degree from an accredited college or university or one of the following designations/licenses: CIMA, CIMC, CFA, CFP, ChFC, or CPA. Candidate must have a satisfactory record of unethical conduct, as determined by IMCA's Admissions Committee and five years of professional client-centered experience in financial services or a related industry. Completion of a six month pre-study educational component and five day in-class program at The University of Chicago Graduate School of Business. Must pass online, proctored final exam for in-class components	40 hours every two years	Y	Generally accepted, not on Allianz approved list
Certified Professional Insurance Agent	CPIA	American Insurance Marketing and Sales Society	N/A	Completion of three, one-day Insurance Success Seminars	Biennial update required can be satisfied through any of the following: 1. Participation in one of the three core Insurance Success Seminars 2. Participation in one of the Advanced Insurance Success Seminars 3. Attending the AIMS Society's annual PRO-to-PRO, or 4. Maintaining individual or agency membership	N	
Certified Professional Insurance Man	CPIM	International Association of Insurance Professionals	N/A	Candidate must meet the following requirements: 1. Sixteen hours of IAIP Educational Programming 2. Membership in NAIW for three years 3. Industry employment for at least five years  Candidate must also complete a non-IAIP educational program or designation	N/A	N	
Certified Professional Insurance Woman	CPIW	International Association of Insurance Professionals	N/A	Candidate must meet the following requirements: 1. Membership in NAIW for three years 2. Industry employment for at least five years  Candidate must also complete at least two educational courses	N/A	N	
Certified Public Accountant	CPA	Boards of Accountancy	Determined by State	Qualification and educational requirements vary by state	Determined by State	Y	Y

Certified Retirement Counselor	CRC	International Foundation for Retirement Education (InFRE)	National Commission for Certifying Agencies	bachelor's degree or equivalent with two years relevant professional experience, or high school diploma or equivalent with five years relevant professional experience as well as completion of a background check. Completion of a 200 question, multiple choice proctored exam	15 hours annually	Y	
Certified Retirement Financial Advisor	CRFA	Society of Certified Retirement Financial Advisors	National Commission for Certifying Agencies	Three years working experience in financial services and/or specific job skills/classroom training in the financial industry and 15 additional credits of education as outlined in the CRFA Candidate Application. Completion of a final, closed-book proctored exam	15 hours annually	Y	N
Certified Retirement Planner	CRP	Retirement Planners, LLC	N/A	Candidate must be a licensed insurance agent with at least one year industry experience. Candidate must complete CRP preliminary and advanced coursework and exams and attend five retirement planning techniques seminars	15 hours annually	Y	N
Certified Retirement Services Professional	CRSP	ABA Institute of Certified Bankers	N/A	Three years' experience in ERISA and IRS Code/Regulations and completion of the approved employee benefit/retirement services training program OR five years' experience in ERISA, plus IRS Code/Regulations. Candidate must also provide one letter of recommendation from a manager. Alternatively, candidates may complete the ICB-approved employee benefit/retirement services training program if the experience criteria is not met. Candidates must pass a multiple-choice, proctored closed book final exam	30 credits every three years	N	
Certified Senior Advisor	CSA	Society of Certified Senior Advisors	National Commission for Certifying Agencies	<p>Candidates must meet one of the following requirements:</p> <ol style="list-style-type: none"> <li>1. Complete the CSA course or its training equivalent AND have one year of paid work experience working with seniors OR 50 hours of volunteering with seniors in the last three years</li> <li>2. Have two years of paid work experience working with seniors OR 100 hours of volunteer experience with seniors within the last three years</li> <li>3. Have a certificate or degree in a field related to working with seniors from an accredited college or university.</li> </ol> <p>Candidates must also complete a closed book proctored exam</p>	30 CSA credits every three years	Y	N
Certified Specialist in Estate Planning	CSEP	National Institute for Excellence in Professional Education, LLC	N/A	Completion of six core and two elective courses as well as a timed online exam for each course	16 hours every two years	N	
Certified Specialist in Retirement Planning	CSRP	National Institute for Excellence in Professional Education, LLC	N/A	Completion of five core and two elective courses as well as a timed online exam for each course	16 hours every two years	N	
Certified Tax Specialist	CTS	Institute of Business & Finance	N/A	Candidate must have a bachelor's degree or one year of financial services work experience, complete the self-study program, three exams and a case study	30 hours every two years	Y	Y

Certified Treasury Professional	CTP	Association of Financial Professionals	N/A	<p>Candidate must meet the following requirements:</p> <ol style="list-style-type: none"> <li>Two years fulltime work experience in the area of corporate finance, treasury/cash management or investor relations;</li> <li>One year of work experience and a graduate or Master's degree in business or finance; or</li> <li>One year work experience and two years fulltime college or university teaching experience in a finance-related topic.</li> </ol> <p>Candidate must receive a passing grade on closed-book, proctored online exam (multiple choice)</p>	36 credits every three years related to treasury/cash management, finance, accounting or business ethics	N	
Certified Trust and Financial Advisor	CTFA	ABA Institute of Certified Bankers	N/A	<p>Candidate must meet the following requirements:</p> <ol style="list-style-type: none"> <li>Three years of wealth management experience plus ICB-approved training program;</li> <li>Five years of personal trust experience and a bachelor's degree; or</li> <li>10 years of personal trust experience</li> </ol> <p>Candidate must also pass a final certification exam</p>	45 credits every three years with a minimum of six hours in each of four knowledge areas	N	
Certified Wealth Consultant	CWC	The Heritage Institute	N/A	Candidates must complete an introduction to The Heritage Process, attend and complete MAX and each of the Advanced Practice Academies, finish personal Guided Discovery and Heritage Statement, a personal sabbatical and the THI Mentoring Program. Candidates must also pass written and oral exams	15 hours annually, attendance of at least one THI event annually and attendance of THI annual meeting every other year	N	
Certified Wealth Management Specialist	CWMS	International Association of Financial Management (INTERFIMA)	N/A	Candidate must have three years' experience in the financial services industry, or an undergraduate or graduate degree in Finance, Economics, Business or Law from an accredited university, college or school. Candidate must also complete five modules, including 40 hours in-class training as well as a proctored, closed book final exam	15 hours every two years	N	
Certified Wealth Preservation Planner	CWPP	The Wealth Preservation Group (WPG)	N/A	Completion of a 24 hour online or in person WPG course and a final exam	24 hours every two years and an open-book recertification exam every three years	N	N
Certified Wealth Strategist	CWS	Cannon Financial Institute	N/A	Three years' experience in the financial services industry that must also include direct interaction with clients and a four year degree from an accredited school. Candidates must also complete two instructor-led training sessions, a self-directed study on numerous wealth management issues, Capstone project and ten mastery exams (one per each directed study module)	33 hours every two years	Y	
Certified Workplace Money Coach	CWMC	LFE Institute	N/A	Candidate must complete 30 financial modules of study via email, web conference and teleconference as well as 35 online competency tests (one for each of the 30 modules and five additional tests)	N/A	N	
Chartered Advisor for Senior Living	CASL	The American College	Middle States Commission on Higher Education Agency	Candidates must meet experience requirements for TAC's CLU, ChFC, RHU, REBC and CLF designations or have advised clients on financial and/or practical matters relating to their retirement years on issues dealing with aging for at least three of the five years preceding the awarding of the designation. Candidate must also complete five required courses (equivalent to 15 semester credit hours) and a final, closed-book proctored exam for each course	15 hours every two years	Y	N
Chartered Advisor in Philanthropy	CAP	The American College	Middle States Commission on Higher Education Agency	<p>Candidates must be engaged in the following professional activities three of the five years immediately preceding the application:</p> <ol style="list-style-type: none"> <li>Advising individuals or charitable organizations in wealth and estate planning, financial planning, charitable planning, charitable giving, planned giving, nonprofit or foundation management or services, investment management of charitable assets or accounting; or</li> <li>Employed in the nonprofit sector in a capacity related to nonprofit management development, planned giving or fundraising.</li> </ol> <p>Candidates must also complete three graduate-level courses (equivalent to nine semester credit hours) and a final, closed-book proctored exam for each course</p>	15 hours every other year	Y	

Chartered Alternative Investment Analyst	CAIA	Chartered Alternative Investment Analyst Association (CAIA)	N/A	Candidate must hold a bachelor's degree or equivalent and have more than one year of business experience in the financial industry or four years of experience in the financial industry. Candidate must also complete Level I and Level II self-study certification programs and two CAIA exams	Complete self-evaluation tool every three years	N	
Chartered Asset Manager	CAM	American Academy of Financial Management (AAFM)	N/A	Candidate must have three years of financial planning experience in asset management and financial planning and complete at least one of the following: 1. AAFM-approved Global Online training Package in financial planning and asset management 2. AAFM-approved degree in finance, tax, accounting, financial services or law from an accredited school or organization 3. Hold a CPA, MBA, MS, PhD or JD from an accredited school or organization 4. Five or more approved and related courses from and AACSB or ACBSP accredited business school or AAFM sanctioned program; or 5. AAFM Executive Certification training course  Note: Examination type varies according to educational requirements listed above	15 hours annually	Y	
Chartered Estate Planning Practitioner	CEPP	Estate Planning Institute	N/A	Candidate must hold a professional license in at least one of the following areas: securities, insurance, accounting, legal, banking, or real estate and complete a self-study program (three segments completed over a two day period). Candidate must complete an online, proctored final exam for each of the three self-study segments	Eight CEPP credits every two years	N	
Chartered Federal Employee Benefits Consultant	ChFEBC	Federal Seminars & ChFEBC, Inc.	N/A	Candidate must have three years of financial services experience, hold a S6, S7, S24, S66 registration/license or the title of Registered Investment Advisor or Investment Advisor Representative. Candidate must also hold a ChFC, CLU, CFA, CFP, JD, CPA, or Master's Degree in business, finance or economics. Candidates must complete 16 modules (self-study or two day classroom course) and a two hour, closed-book proctored exam	10 hours every two years	Y	
Chartered Financial Analyst	CFA	CFA Institute	N/A	Candidate must hold an undergraduate degree or a combination of college and full time work experience adding up to four years. Candidate must also complete three self-study programs (250 hours each) and three six hour course exams	N/A	Y	Y
Chartered Financial Consultant	ChFC	The American College	Middle States Commission on Higher Education Agency	Three years of full-time business experience within the five years preceding the awarding of the designation, seven core and two elective courses (equivalent to 27 semester credit hours) and a closed-book, proctored final exam for each course	30 hours every two years	Y	Y
Chartered Financial Engineer	ChFE	The Financial Engineering Institute	N/A	Candidates must complete an interview process, have a minimum of ten years financial planning experience, be registered and in good standing with any applicable regulatory organization and hold one of the following professional designations: AEP, CEP, CFA, CFP, CIC, CLU, ChFC, CPA, CSA, PFS or JD. Candidates must also pass a closed book, proctored final exam	20 hours every two years	N	
Chartered Investment Counselor	CIC	Investment Advisor Association	N/A	Candidate must meet ALL of the following requirements: 1. Be employed by a member firm of the IAA in an eligible occupational position for at least one year 2. Have a minimum of five cumulative years of work experience in one or more eligible occupational positions 3. Spend more than 50 percent of time in a position involving a combination of investment counseling and portfolio management activities 4. Submit a letter of reference from the CEO, managing principal or the candidate's senior supervisor and three additional letters of recommendation; and 5. Hold the Chartered Financial Analyst designation	Annual certification of employment by an IAA member firm and no disciplinary proceedings arising from professional conduct	N	Y
Chartered Leadership Fellow	CLF	The American College	Middle States Commission on Higher Education Agency	Completion of six required courses and final exam(s)	Unclear	Y	Y
Chartered Life Underwriter	CLU	The American College	Middle States Commission on Higher Education Agency	Three years of full-time business experience within the five years preceding the awarding of the designation, five core and three elective courses (equivalent of 24 semester credit hours) and a closed book, proctored final exam for each course	30 hours every two years	Y	Y

Chartered Market Analyst	CMA	American Academy of Financial Management (AAFM)	N/A	<p>Candidates must have two of the following:</p> <ol style="list-style-type: none"> <li>1. An ABA AACSB, ACBSP or Equis Accredited Financial, Investment, Accounting, Tax or Economics degree</li> <li>2. Three years of professional experience</li> <li>3. A government recognized degree: licenses, degree, MBA/Master's or Law degree, PhD, CPA, recognized designations and specialization work</li> <li>4. A related degree and exams from an AAFM-approved and accredited university program; and/or</li> <li>5. Completion of online Executive Certification Training Programs</li> </ol> <p>Examination varies according to the educational requirements listed above</p>	15 hours annually	Y	
Chartered Market Technician	CMT	Market Technicians Association, Inc.	N/A	Three years of professional analytical or investment management experience and membership in the Market Technicians Association. Candidates must also complete three levels of online proctored examinations	N/A	Y	
Chartered Mutual Fund Counselor	CMFC	College for Financial Planning	U.S. Department of Education Regional Accredited Agencies, North Central Association of Colleges and Schools, The Higher Learning Commission	Nine modules of self-study courses and completion of an online, closed book, proctored final exam	16 hours every two years	Y	Y
Chartered Portfolio Manager	CPM	American Academy of Financial Management (AAFM)	N/A	<p>Three years of experience actively managing investment portfolios and completion of one of the following:</p> <ol style="list-style-type: none"> <li>1. AAFM-approved degree in finance, tax, accounting, financial services, law or a CPA, MBA, MS, PhD or JD from an accredited school or organization</li> <li>2. Five or more approved and related courses from an AACSB or ACBSP accredited business school or AAFM sanctioned program; and/or</li> <li>3. AAFM Executive Certification training course</li> </ol> <p>Examination varies according to the educational requirements listed above</p>	15 hours each year	Y	
Chartered Property Casualty Underwriter	CPCU	The Institutes	N/A	Four foundation courses, one elective course, three courses in either personal or commercial lines and a final exam. No continuing education requirements	N/A	N	
Chartered Retirement Planning Counselor	CRPC	College for Financial Planning	Higher Learning Commission	Online instructor led or self-study course and completion of an online, closed book, proctored final exam	16 hours every two years	Y	Y
Chartered Retirement Plans Specialist	CRPS	College for Financial Planning	Higher Learning Commission	Online instructor led or self-study course and completion of an online, closed book, proctored final exam	16 hours every two years	Y	Y
Chartered Senior Financial Planner	CSFP	Association of Chartered Senior Financial Planners	N/A	Two years insurance or securities experience or be a licensed attorney or CPA, completion of a three day course and closed book final exam	16 hours every two years	Y	
Chartered Trust and Estate Planner	CTEP	American Academy of Financial Management (AAFM)	N/A	<p>Candidates must have two of the following:</p> <ol style="list-style-type: none"> <li>1. An ABA AACSB, ACBSP or Equis Accredited Financial, Investment, Accounting, Tax or Economics degree</li> <li>2. Three years of professional experience</li> <li>3. A government recognized degree: licenses, degree, MBA/Master's or Law degree, PhD, CPA, recognized designations and specialization work</li> <li>4. A related degree and exams from an AAFM-approved and accredited university program; and/or</li> <li>5. Completion of online Executive Certification Training Programs</li> </ol> <p>Examination varies according to the educational requirements listed above</p>	15 hours per year	Y	
Chartered Wealth Manager	CWM	American Academy of Financial Management (AAFM)	N/A	<p>Candidates must have two of the following:</p> <ol style="list-style-type: none"> <li>1. An ABA AACSB, ACBSP or Equis Accredited Financial, Investment, Accounting, Tax or Economics degree</li> <li>2. Three years of professional experience</li> <li>3. A government recognized degree: licenses, degree, MBA/Master's or Law degree, PhD, CPA, recognized designations and specialization work</li> <li>4. A related degree and exams from an AAFM-approved and accredited university program; and/or</li> <li>5. Completion of online Executive Certification Training Programs</li> </ol> <p>Examination varies according to the educational requirements listed above</p>	15 hours per year	Y	



Christian Financial Professionals Network Certified Member	CFPN	Christian Financial Professionals Network	N/A	<p>Candidates must complete one of the following:</p> <ol style="list-style-type: none"> <li>1. Hold one of the following professional designations: CFP, ChFC, CPA, PFS, EA, CFA, CLU or JD; or</li> <li>2. 10 years of full-time financial experience</li> </ol> <p>Candidates must complete three CFPN training sessions, a closed book exam and adhere to certain Christian beliefs, as evidenced by signing a "Statement of Faith"</p>	15 hours annually	N	
Direct Participation Professional	DPP	REISA	N/A	<p>Candidate must meet ALL of the following:</p> <ol style="list-style-type: none"> <li>1. Hold a bachelor's degree or equivalent OR one of the following licenses: S1, S7, S22 or S65</li> <li>2. Be employed full-time at least two of the last five years with a qualifying company as defined by REISA and actively involved in the direct participation industry; or</li> <li>3. Active full-time as a Registered Representative, Registered Investment Advisor or Investment Advisor Representative</li> </ol> <p>Candidates must also complete a minimum of eight hours of direct participation program or general best practices-related professional development and education and a timed multiple choice exam with a score of 70%</p>	Four hours of direct participation program or general best practices-related professional development	N	
Diversified Advanced Education	DAE	International Association of Insurance Professionals (IAIP)	N/A	<p>Candidate must hold a CPIW, CPIM or CIIP designation for a minimum of three years and meet the following requirements:</p> <ol style="list-style-type: none"> <li>1. Completion of an ethics program</li> <li>2. Completion of classroom based courses (25 hours), one class leading to an industry designation, or writing requirement</li> <li>3. Completion of 12 hours of IAIP educational programming</li> <li>4. Service on a committee of the sponsoring organization; and</li> <li>5. Attendance at two conventions associated with IAIP</li> </ol>	<p>Renewal every five years, including:</p> <ol style="list-style-type: none"> <li>1. Completion of IAIP's Ethics program OR state certified Ethics program</li> <li>2. IAIP membership must be continuous since CPIW/CPIM/CIIP conferment; and</li> <li>3. Meet industry education, IAIP Program and Participation standards during the past five years</li> </ol>	N	
Endorsed Local Provider	ELP	<a href="http://daveramsey.com">daveramsey.com</a>	N/A	Each category of ELPs has category-specific requirements. No minimum years of experience is specified but more details are available at daveramsey.com	N/A	Y	N
Enrolled Agent	EA	Internal Revenue Service (IRS)	N/A	Candidates must pass a background check and must either pass a written exam or have accepted IRS experience. More details can be located in IRS Circular 230	72 hours every three years with a minimum of 16 hours each year. Candidates must also complete six hours of ethics training over a three year enrollment period	Y	Y
Estate Planning Law Specialist	EPLS	Estate Law Specialist Board, Inc.	American Bar Association (ABA)	<p>Candidate must be a licensed attorney and meet the following requirements:</p> <ol style="list-style-type: none"> <li>1. Five or more years as an estate planning attorney during which at least 1/3 of the attorney's practice is devoted to estate planning</li> <li>2. 12 or more hours co CLE in estate planning topics per year for the last three years</li> <li>3. Verification of professional liability insurance coverage</li> <li>4. Recommendations from at least five colleagues that are not related to or within the same firm as the applicant; and</li> <li>5. Passing a comprehensive exam designed so competent attorneys having constant exposure to estate planning can pass without substantial independent study</li> </ol> <p>Each attorney must consult the rules in his or her own state to determine if he/she may hold him/herself out as a specialist (many states permit this if the certification is awarded by an ABA-accredited program but not all)</p>	12 hours in estate planning annually	Unclear	Y
Fellow of the Academy of Life Underwriting	FALU	The Academy of Life Underwriting	N/A	ALU Level 2 Diploma, three elective courses offered through the Academy of Life Underwriting and completion of a multiple choice (written) exam	N/A	N	
Fellow, Financial Services Institute	FFSI	LOMA	N/A	Completion of seven LOMA courses and three LOMA professional achievement credits and a proctored exam	N/A	N	
Fellow, Life Management Institute	FLMI	LOMA	N/A	Ten course professional development program and final course examinations	N/A	N	

Financial Analyst Designate	FAD	American Academy of Financial Management (AAFM)	N/A	<p>Candidates must have two of the following:</p> <ol style="list-style-type: none"> <li>1. An ABA AACSB, ACBSP or Equis Accredited Financial, Investment, Accounting, Tax or Economics degree</li> <li>2. Three years of professional experience</li> <li>3. A government recognized degree: licenses, degree, MBA/Master's or Law degree, PhD, CPA, recognized designations and specialization work</li> <li>4. A related degree and exams from an AAFM-approved and accredited university program; and/or</li> <li>5. Completion of online Executive Certification Training Programs</li> </ol> <p>Examination varies according to the educational requirements listed above</p>	15 hours per year	Y	
Financial Risk Manager	FRM	Global Association of Risk Professionals (GARP)	N/A	Multiple choice paper exam given in two parts	Voluntary, recommended 40 hours every two years	N	
Financial Services Specialist	FSS	The American College	Middle States Commission on Higher Education Agency	Three required and elective American College courses and one final exam per course	N/A	Y	Y
Five Star Wealth Manager	N/A	N/A	N/A	Based on scores determined and adjusted to reflect peer input, regulatory history and a Blue Ribbon Panel Review	N/A	N	N
Global Financial Steward	GFS	3ethos	N/A	Read the book LeaderMetrics and complete a 22 hour onsite program of coursework and training	12 articles of leadership research each year on articles provided on the 3ethos website	Y	
Graduate Estate Planning Consultant	GEPC	N/A	N/A	N/A	N/A	N/A	N
Long Term Care Professional	LTCP	N/A	N/A	Two day class	N/A	N/A	N
Life Underwriter Training Council (Fellow)	LUTC(F)	The American College and the National Association and the National Association of Insurance and Financial Advisors (NAIFA)	Middle States Commission on Higher Education Agency	Candidates must have a membership in their local association of NAIFA, complete six courses and an online, proctored final exam	Three hours of ethics-related CE every two years	Y	Y
Master Certified Estate Planner	MCEP	National Institute of Certified Estate Planners (NICEP)	N/A	Candidates must have previously earned the CEP designation and be in current good standing with NICEP, complete eight modules (combination of online and self-study courses) and a proctored final exam	Eight hours every two years in the area of estate planning	Y	Y
Master of Science of Financial Planning	MSFP	N/A	N/A	N/A	N/A	N/A	Y
Master of Science of Financial Services	MSFS	N/A	N/A	N/A	N/A	N/A	Y
Master of Science in Management	MSM	N/A	N/A	N/A	N/A	N/A	Y
National Social Security Advisor	NSSA	National Social Security Association	N/A	NSSA administered eight hour course and completion of an online proctored exam	16 hours every two years	Y	
PLANSPONSOR Retirement Professional	PRP	PLANSPONSOR Institute	N/A	Five years of direct retirement industry sales, service and/or support experience. Completion of online coursework and two day onsite seminar and attendance at a multi-day, instructor led training session as well as a proctored exam	Yes, but specifics not listed	Y	
Personal Financial Specialist	PFS	The American Institute of Certified Public Accountants (AICPA)	N/A	<p>Candidate must meet ALL of the following requirements:</p> <ol style="list-style-type: none"> <li>1. Be a member of the AICPA</li> <li>2. Hold an unrevoked CPA certificate issued by a state authority; and</li> <li>3. Have at least two years of full-time teaching or business experience (or 3,000 equivalent) in personal financial planning within the five year period preceding the data of the CPA/PFS application</li> </ol> <p>Minimum of 75 hours of personal financial planning education within the five year period preceding the date of the PFS application and completion of a final exam</p>	60 hours (or its equivalent) of continuing professional education every three years	Y	Y
Personal Retirement Planning Specialist	PRPS	Association of Insurance and Financial Specialists	N/A	Investment Advisor licensing or equivalent, 24 hours of live web cast sessions and completion of an online, open book final exam	Eight hours annually	Y	
Professional Plan Consultant	PPC	Financial Service Standards	N/A	Three years of direct financial plan industry sales, service and/or support experience. 16 hour classroom training or web-based training and completion of a 50 question, multiple choice, closed-book final exam	Six hours annually	Y	
Qualified Financial Planner	QFP	International Association of Qualified Financial Planners	N/A	Candidate must have a minimum of three years' experience in the field of Financial Planning AND hold one or more of the following designations: ChFC, CFP, MS, MSFS and/or PFS. Education and exam requirements vary according to the designations listed above	15 hours annually	Y	

Qualified Kingdom Advisor	QKA	Kingdom Advisors, Inc.	N/A	All candidates must sign a "Statement of Faith," obtain a letter of reference from pastor or member of pastoral staff, a signed statement of personal stewardship and two client references. Candidates must complete Kingdom Advisors core training and an open-book final exam	10 hours of Kingdom Advisors CE credits per year	Y	
Qualified Plan Financial Consultant	QPFC	American Society of Pension Professionals & Actuaries	N/A	Completion of the following ASPPA exams: 1. Retirement Plan Fundamentals 1 & 2 2. Plan Financial Consulting 1 & 2	40 credits every two years	Y	
Registered Employee Benefits Consultant	REBC	The American College	Middle States Commission on Higher Education Agency	Completion of five self-study or online required courses	Varies by state	Y	Y
Registered Fiduciary	RF	DALBAR, Inc.	N/A	Practicing fiduciary with credentials and licenses in appropriate to services being offered, validated by DALBAR during application review. RF fiduciary training and at least one specialty training course by and RF-qualified training organization (approximately 15-20 hours) and completion of an online, proctored final exam	Re-test every five years	Y	
Registered Financial Associate	RFA	International Association of Registered Financial Consultants (IARFC)	N/A	Bachelor's or graduate degree in financial planning from an institution offering an IARFC-approved or CFP-equivalent curriculum and completion of "college course exams"	40 hours per year	Y	
Registered Financial Consultant	RFC	International Association of Registered Financial Consultants (IARFC)	N/A	Candidate must meet ALL of the following requirements: 1. Undergraduate or graduate financial planning degree, or have earned one of the following designations: AAMS, AEP, CEP, CFA, CFP, ChFC, CLU, CPA, EA, LUTC, MS, MBA, JD, PhD or completed a CFP equivalent, IARFC-approved college curriculum 2. Licensing requirements relevant to the license candidate holds; and 3. Four years full-time experience as a financial planning practitioner  Candidate must also complete approved college curriculum in personal financial planning or IARFC self-study course and an IARFC-approved exam	40 hours per year	Y	N
Registered Financial Gerontologist	RFG	American Institute of Financial Gerontology	N/A	Completion of six courses within the field of financial gerontology and a comprehensive exam and agree to fulfill a service learning requirement and subscribe to a code of ethics	Yes, but specifics not listed	N	
Registered Financial Planner	RFP	Registered Financial Planners Institute (RFP)	N/A	Two years of financial planning experience, completion of 120 hours of approved education and evidence of passing exams related to area(s) of expertise	20 hours every three years	Y	N
Registered Financial Specialist	RFS	American Academy of Financial Management (AAFM)	N/A	Three years of financial planning experience in asset management and financial planning and completion of one of the following: 1. AAFM-approved Global Online Training Package in financial planning and asset management 2. AAFM-approved degree in finance, tax, accounting, financial services, law or a CPA, MBA, MS, PhD or JD from an accredited organization 3. Five or more approved and related courses from an AACSB or ACBSP accredited business school or AAFM sanctioned program; or 4. AAFM Executive Certification training course  Exam types vary according to educational requirements listed above	15 hours per year	Y	
Registered Paraplanner	RP	College for Financial Planning	U.S. Department of Education Regional Accredited Agencies, North Central Association of Colleges and Schools, The Higher Learning Commission	Completion of an internship and 10 module self-study or instructor led course and an online, closed-book, proctored final exam	16 hours every two years	Y	Y
Retirement Income Certified Professional	RICP	The American College	Middle States Commission on Higher Education Agency	Three years of professional experience, three required courses (equivalent to nine hours) and a closed-book, proctored final exam for each course	15 hours every two years	Y	Y
Retirement Management Analyst	RMA	Retirement Income Industry Association (RIIA)	N/A	Three or more years of experience as a financial advisor working with clients on retirement and non-retirement portfolios, or comparable experience in the financial services industry directly involved in the retirement and investments business. Completion of both an RIIA approved education program and RMA multiple-choice examination	20 hours annually	Y	
Retirement Plans Associate	RPA	International Foundation of Employee Benefit Plans and Wharton School of the University of Pennsylvania	N/A	Self-study, online or classroom completion of three CEBS courses and a computer based exam for each course	N/A	N	

Senior Registered Financial Planner	SRFP	Registered Financial Planners Institute (RFP)	N/A	Five years financial planning in respective field, an associates degree or equivalent with an emphasis on personal taxation, 60 hours of education in estate and retirement planning and 30 hours of education in investment products	N/A	N/A	N
Society of Trusts and Estate Practitioners	STEP	Society of Trusts and Estate Practitioners	N/A	No exam required to obtain this specific designation	N/A	N/A	N
Wealth Management Specialist	WMS	Kaplan University/Dearborn Financial	N/A	High school diploma or GED, self-study course with 10 lessons, quiz for each lesson and an overall certification exam	N/A	N	