

Date Taken	Program Name	Sponsor	City	State	Subject Code	Napfa Hour(s)	CFP Hour(s)	Date Created	Date Modified
01/10/2018	2018 Outlook: Markets and Economies	Asset TC			C	1.00		03/12/2018	09/24/2018
01/31/2018	Estate Planning	Trust Estates			F	1.00		09/19/2018	09/24/2018
02/14/2018	Ethics	CFP Board Ethics			G	2.00		09/19/2018	09/24/2018
02/14/2018	Financial planning with Tax Cut and Job Act	Right Capital			D	1.00		03/12/2018	09/24/2018
02/14/2018	CFP Board Ethics Education Program	Blue Ocean Global Wealth			G	2.00		03/12/2018	09/24/2018
02/21/2018	Extending the Advisor's Alpha Conversation: The Five Building Blocks of Successful Portfolio Construction	FPA			C	1.00		03/12/2018	09/24/2018
02/21/2018	Tax Reform	FPA Illinois			D	2.00		03/12/2018	09/24/2018
02/21/2018	Portfolio Construction	Vanguard			C	1.00		09/19/2018	09/24/2018
03/13/2018	Insurance	LLIS			B	1.00		09/19/2018	09/24/2018
04/05/2018	Human Impact	Financial Advisor			J	1.00		09/19/2018	09/24/2018
04/10/2018	Factor	ETF Trends			C	1.00		09/19/2018	09/24/2018
04/18/2018	Markets	Davis			C	1.00		09/19/2018	09/24/2018
04/25/2018*	How to Avoid Compliance Failures – A Review of the SEC's 2018 Examination Priorities	NAPFA		IL	K	1.00		05/08/2018	09/24/2018
04/25/2018	Retirement	Shepard			E	1.00		09/19/2018	09/24/2018
04/25/2018	Retirement	FPA			E	1.50		09/19/2018	09/24/2018
04/26/2018	Retirement	blackrock			E	1.00		09/19/2018	09/24/2018
04/26/2018	Retirement	blackrock			E	1.00		09/19/2018	09/24/2018
05/01/2018	Factors	Blacrock			C	1.50		09/19/2018	09/24/2018
05/08/2018	Guide Retirement	Broker			E	4.00		09/19/2018	11/19/2018
05/08/2018	Many Topics - Guide to Retirement Planning Strategies	Broker Educational Sales & Training,			F	1.00		11/19/2018	11/19/2018

05/15/2018	Trump	Financial Advisor			C	1.00		09/19/2018	09/24/2018
06/13/2018	Kahneman	Morningstar			J	1.00		09/19/2018	09/24/2018
06/13/2018	Many-Conference 1	Morningstar			C	6.00		09/19/2018	10/02/2018
06/13/2018	Crypto	Morningstar			C	1.00		09/19/2018	09/24/2018
06/13/2018	Blockchain	Morningstar			C	1.00		09/19/2018	09/24/2018
06/13/2018	Global Equity	Morningstar			C	1.00		09/19/2018	09/24/2018
06/13/2018	Wired	Morningstar			A	1.00		09/19/2018	09/24/2018
07/19/2018	Employee Benefits	DFA			E	1.00		09/19/2018	09/24/2018
07/22/2018	SEI Investments ETF Market Overview	SEI			C	1.00		12/14/2018	12/14/2018
07/31/2018	College	Colleg Savings			A	1.50		09/19/2018	09/24/2018
08/21/2018	Indexing	DFA			C	1.00		09/19/2018	09/24/2018
08/27/2018	SEI Investments Navigating the Future of Retirement	SEI			E	1.00		12/14/2018	12/14/2018
08/29/2018	Emerging	HiddenLevers			C	1.00		09/19/2018	09/24/2018
09/05/2018	Real Estate	RIA Data			C	1.00		09/19/2018	09/24/2018
09/05/2018	Tax Loss	ETF Trends			D	1.00		09/19/2018	09/24/2018
09/06/2018	Trends Taxes	American Century			D	1.00		09/19/2018	09/24/2018
09/06/2018	ETF	Invesco			C	1.00		09/20/2018	09/24/2018
09/12/2018	Target Date	Wealth Management			C	1.00		09/19/2018	09/24/2018
09/13/2018	Many-Conference 2	Morningstar			B	2.00		09/24/2018	10/02/2018
09/19/2018	Behavioral Coaching	FPA Vanguard			J	1.00		09/19/2018	09/24/2018
09/20/2018	Closed End Fund	CEFA			C	3.00		09/20/2018	09/24/2018
09/24/2018	September 2018: Year-End Tax Planning for 2018 and Beyond	SEI			D	1.00		09/24/2018	10/02/2018
09/24/2018	September 2018: Year-End Tax Planning for 2018 and Beyond	SEI			D	1.00		09/24/2018	10/02/2018
09/24/2018	Tax Planning for the New Tax Year	SEI			D	1.00		12/14/2018	12/14/2018
09/26/2018	Delaware Investments Understanding Opportunities in Emerging Markets 1.00	Delware			C	1.00		11/19/2018	11/19/2018

09/26/2018	Journey Through Clients' Crisis Situations	FPA			J	1.00		09/26/2018	10/02/2018
09/26/2018	Insights from a Thought Leader: Ken French	DFA			C	1.00		10/10/2018	10/10/2018
09/27/2018	HiddenLevers Financial Crisis PTSD	HiddenLevers			J	1.00		11/19/2018	11/19/2018
10/03/2018	FPA - Financial Planning Association The Future is Behavioral	FPA			J	1.00		11/19/2018	11/19/2018
10/03/2018	FPA - Financial Planning Association The Role of Annuities in Wealth Management 1.00	FPA			B	1.00		11/19/2018	11/19/2018
10/03/2018	FPA - Financial Planning Association Academic Research Presentations (JFP/AFS), Part 3	FPA			C	1.00		11/19/2018	11/19/2018
10/03/2018	FPA - Financial Planning Association Cracking the Tax Debacle in your Practice	FPA			D	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association Annuities: The Good, The Bad, The Brutal Truth	FPA			B	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association Evolving Trends and Changing Laws	FPA			A	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association Managing Health Care and Health Insurance Costs	FPA			B	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association Navigating Student Loan Programs: The Latest Devel 1.00	FPA			A	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association All In The Family: Generational Wealth Transfer 1.00	FPA			F	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association How to Build Deeper Relationships with Your Female	FPA			J	0.50		11/19/2018	11/19/2018

10/04/2018	FPA - Financial Planning Association How to Grant Your Clients an Awesome Life	FPA			J	1.00		11/19/2018	11/19/2018
10/04/2018	FPA - Financial Planning Association Leveraging Guaranteed Income through Commission-Fr	FPA			B	0.50		11/19/2018	11/19/2018
10/09/2018	Reverse Mortgage Funding, LLC Expert Advice on FAFSA and College Planng	Reverse Mortgage			A	1.00		10/11/2018	10/11/2018
10/30/2018	>> 10/30/2018 RIA Database Navigating Potential Disruptions in a Changing Mon 1.00	William Blair			C	1.00		10/30/2018	10/30/2018
10/31/2018	Preparing for Down Market Conditions	ETF Trends			C	1.00		11/07/2018	11/07/2018
12/05/2018	End of Year Financial Planning Tips Under N	American College			A	1.00		12/14/2018	12/14/2018
						78.50			