



**Beacon Hill CFP® Self-Study Courses**

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Course #	98	2951	2952	2956	2955	2958	2953	2954	2957	4917	2901	1921	4901	4912	1940	2902	4910	4911	2903	5903	4815	4905	4919	2905	1941	2908	2906	2904	1942	
Download Price	\$39	\$99	\$119	\$139	\$119	\$149	\$75	\$129	\$149	\$39	\$59	-	\$119	\$109	-	\$59	\$109	\$119	\$49	\$39	\$39	\$109	\$139	\$59	-	\$69	\$59	\$49	-	
Print Price (+ s & H)	\$39	\$119	\$149	\$159	\$139	\$179	\$89	\$149	\$179	\$49	\$69	\$129	\$139	\$129	\$119	\$69	\$129	\$139	\$59	\$49	\$49	\$129	\$169	\$69	\$89	\$79	\$69	\$59	\$179	
<b>BHFE COURSES:</b>	→																													
<b>NAPFA 2 yr Requirement</b> 60 credit hours: 30 in Core subjects (min. 5, max. 15 per area); + 2 in CFP® Ethics; + 28 in Core or Electives. <b>CORE SUBJECTS:</b>	<p><b>CFP Board Code of Ethics and Practice Standards</b></p> <p>Advisor's Guide to Buying and Selling a Business</p> <p>Advisor's Guide to Charitable Planning</p> <p>Advisor's Guide to Ret. Plan. &amp; Employee Ben.</p> <p>Advisor's Guide to Long-Term Care</p> <p>Advisor's Guide to Investment Planning</p> <p>Advisor's Guide to Planning for the Baby Boomer Client</p> <p>Advisor's Guide to Plan. for the Older Client</p> <p>Advisor's Guide to Estate Planning</p> <p>American Recovery and Reinvestment Act</p> <p>Annuities Update</p> <p>Asset Allocation</p> <p>Asset Protection Tax Strategies</p> <p>Building Client Wealth With Effective Tax Planning</p> <p>Conserving Portfolios During Retirement</p> <p>Disability Insurance</p> <p>Divorce Tax Planning</p> <p>Estate Planning Tax Strategies</p> <p>Estate Tax Update</p> <p>Ethics for Accountants (See state list on pg. 2)</p> <p>Family Tax Planning</p> <p>Financial Planning Tax Strategies</p> <p>Guide to Federal Individual and Corporate Taxation</p> <p>IRAs Update</p> <p>Life Planning: The Kinder Method™</p> <p>Long-Term Care Update</p> <p>Nonqualified Plans Update</p> <p>Paul Winn's Life Insurance Update</p> <p>Private Wealth Management</p>																													
Insurance & Risk Mgt					8			4								4											2			5
Investments						28					4	12		5																6
Income Tax Planning		5		10					13	2			6	5			5	6	2		2	5	20							3
Retirement Planning & Employee Benefits				15	7		7	11							10									4		3	4			5
Estate Planning			16						2	15								6	1											8
Counseling and Communications																									6					
CFP® Ethics	2																			2*										
<b>NAPFA ELECTIVES</b>	(Maximum of 5 credit hours per subject area) * Does not meet the CFP Board Ethics requirement.																													
Fund. of Fin. Planning		5											6				5													1
Acctg./Cash Fl./Budget																														
Econ./Poli. Environment																														
Mktg & Practice Mgt																														
Strategic Thinking																														
Technology																														
# Credits, Core	2	5	16	25	15	28	7	17	28	2	4	12	6	10	10	4	5	12	3	2	2	5	20	4	6	5	4	3	27	
# Credits, Elective	0	5	0	0	0	0	0	0	0	0	0	0	6	0	0	0	5	0	0	0	0	5	0	0	0	0	0	0	0	1
<b>Total CFP® Credits</b>	<b>2</b>	<b>10</b>	<b>16</b>	<b>25</b>	<b>15</b>	<b>28</b>	<b>7</b>	<b>17</b>	<b>28</b>	<b>2</b>	<b>4</b>	<b>12</b>	<b>12</b>	<b>10</b>	<b>10</b>	<b>4</b>	<b>10</b>	<b>12</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>10</b>	<b>20</b>	<b>4</b>	<b>6</b>	<b>5</b>	<b>4</b>	<b>3</b>	<b>28</b>	
<b>CPE (CPA) &amp; EA Credits</b>	3									4			15	17			10	14.5		4	2	15	TBA							
	<p><b>CFP Board Code of Ethics and Practice Standards</b></p> <p>Advisor's Guide to Buying and Selling a Business</p> <p>Advisor's Guide to Charitable Planning</p> <p>Advisor's Guide to Ret. Plan. &amp; Employee Ben.</p> <p>Advisor's Guide to Long-Term Care</p> <p>Advisor's Guide to Investment Planning</p> <p>Advisor's Guide to Planning for the Baby Boomer Client</p> <p>Advisor's Guide to Plan. for the Older Client</p> <p>Advisor's Guide to Estate Planning</p> <p>American Recovery and Reinvestment Act</p> <p>Annuities Update</p> <p>Asset Allocation</p> <p>Asset Protection Tax Strategies</p> <p>Building Client Wealth With Effective Tax Planning</p> <p>Conserving Portfolios During Retirement</p> <p>Disability Insurance</p> <p>Divorce Tax Planning</p> <p>Estate Planning Tax Strategies</p> <p>Estate Tax Update</p> <p>Ethics for Accountants (State CPA Ethics)</p> <p>Family Tax Planning</p> <p>Financial Planning Tax Strategies</p> <p>Guide to Federal Individual and Corporate Taxation</p> <p>IRAs Update</p> <p>Life Planning: The Kinder Method™</p> <p>Long-Term Care Update</p> <p>Nonqualified Plans Update</p> <p>Paul Winn's Life Insurance Update</p> <p>Private Wealth Management</p>																													

Course #	2907	4908	2959	4814	1953	1908	4920	2994	4966	4918	4902	4916	4903	4904	4913	4906	4921	4907	4909	2984	1939	2975	1936	1931
Download Price	\$49	\$89	109	\$39	\$129	-	\$69	\$89	\$139	\$39	\$39	\$39	\$39	\$39	\$39	\$39	\$29	\$39	\$39	\$39	-	\$39	-	-
Print Price (+ s & H)	\$59	\$109	129	\$49	\$159	\$109	\$79	\$99	\$169	\$49	\$49	\$49	\$49	\$49	\$49	\$49	\$35	\$49	\$49	\$49	\$59	\$49	\$99	\$99
<b>BHFE COURSES:</b> →																								
<b>NAPFA 2 yr Requirement</b> 60 credit hours: 30 in Core subjects (min. 5, max. 15 per area); + 2 in CFP® Ethics; + 28 in Core or Electives.	Qualified Plan Design Update	Real Estate Tax Planning	Risk Management for Financial Planners	Selected Legal Issues with Tax Analysis	Small Business Tax Planning	Social Security, Medicare, and Government Plans	Statutory Update	Strategic Index Investing	1040 Workshop	2010 Tax Overview	Tax Guide to Asset Protection	Tax Guide to Bankruptcy	Tax Guide to Business Entities	Tax Guide to Compensation and Benefits	Tax Guide to Education Planning	Tax Guide to Financial Planning	Tax Guide to the 2010 Health Care Act	Tax Guide to Interest and Debt	Tax Guide to Retirement Planning	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 Should Know About Technical Analysis
Insurance & Risk Mgt Investments			11																					
Income Tax Planning		6		2	10		5		20	2	1	1	1	1	1	1	1	2	1					
Retirement Planning & Employee Benefits	3					11								1					1					
Estate Planning																								
Counseling and Communications																								
Financial Planning																								
<b>NAPFA ELECTIVES</b>	(Maximum of 5 credit hours per subject area)																							
Fund. of Fin. Planning		3			5						1	1	1		1	1								3
Acctg./Cash Fl./Budget																								
Econ./Poli. Environment																								
Mktg & Practice Mgt																								
Strategic Thinking																								
Technology																								
# Credits, Core	3	6	11	2	10	11	5	8	20	2	1	1	1	2	1	1	1	2	2	2	0	2	4	8
# Credits, Elective	0	3	0	0	5	0	0	0	0	0	1	1	1	0	1	1	0	0	0	0	3	0	0	0
<b>Total CFP® Credits</b>	<b>3</b>	<b>9</b>	<b>11</b>	<b>2</b>	<b>15</b>	<b>11</b>	<b>5</b>	<b>8</b>	<b>20</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>2</b>	<b>2</b>	<b>2</b>	<b>3</b>	<b>2</b>	<b>4</b>	<b>8</b>	
<b>CPE (CPA) &amp; EA Credits</b>		12		3	26		8		38	4	2.5	3	3	3	3	2	3	2	2	3		3		
	Qualified Plan Design Update	Real Estate Tax Planning	Risk Management for Financial Planners	Selected Legal Issues with Tax Analysis	Small Business Tax Planning	Social Security, Medicare, and Government Plans	Statutory Update	Strategic Index Investing	1040 Workshop	2010 Tax Overview	Tax Guide to Asset Protection	Tax Guide to Bankruptcy	Tax Guide to Business Entities	Tax Guide to Compensation and Benefits	Tax Guide to Education Planning	Tax Guide to Financial Planning	Tax Guide to the 2010 Health Care Act	Tax Guide to Interest and Debt	Tax Guide to Retirement Planning	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: Psychology of Investing	What Advisors Should Know About Technical Analysis

**State CPA Ethics Courses:**  
 AZ, AR, CA, CO, CT, DC, FL, ID, IL, IN, IA, KS, KY, ME, MD, MA, MI, NE, NV, NH, NM, NY, OH, OK, OR, TX, WV. Also: **Ethics for EAs**

**Also: Ethics for EAs**



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