BEACON HILL
FINANCIAL EDUCATORS

www.bhfe.com

BEACON HILL Self-Study Courses

Suggested Credit Allocation for NAPFA CE Subject Areas
For more information:
https://www.napfa.org/member-resources/ce-guidelines

2-Year NAPFA CE Requirement for 1/1/20 thru 12/31/21:
60 credit hours overall; 32 hrs in Core subjects including 2 in ethics, (min. 5, max 15 per area); plus 28 in Core or Electives.

800-588-7039

NAPFA Subject		Title / Credit Hours by License:	CPA	CFP®	EA OTRP	ERPA	CDFA
Core Subject Areas			Use highest credit applicable to your other license(s)				
B - Insurance & Risk Management		Business Insurance Overview	3	2			
B - Insurance & Risk Management		Long Term Care Planning	6	4.5			
B - Insurance & Risk Management		Personal Life Insurance Planning	4	2.5			
C - Investments		Advisor's Guide to Investment Planning	36	28			
C - Investments		Annuities	6	4.5			
C - Investments		Asset Allocation-Balancing Financial Risk		14			
C - Investments		Business Valuation	3	2			
C - Investments		What Advisors Should Know About Fundamental Analysis		10			
C - Investments		What Advisors Should Know About Psychology of Investing		7			
D - Income Tax Planning		1040 Workshop	28	20	28		
D - Income Tax Planning		Comprehensive Tax Update	30		30		
D - Income Tax Planning		Tax Update-Must Know Provisions	20		20		
D - Income Tax Planning		Federal Income Tax Update	6	5	6		
D - Income Tax Planning		Affordable Care Act Employer Mandate	3.5		3		
D - Income Tax Planning		Affordable Care Act Tax Provisions	5		5		
D - Income Tax Planning		Annual Tax Season Update	9		9		
D - Income Tax Planning		Asset Protection Tax Strategies	17.5	12	17		
D - Income Tax Planning		Auto Rules	2		2		
D - Income Tax Planning		Business Travel and Entertainment	2		2		
D - Income Tax Planning		Comprehensive Tax Course on Retirement Planning	31.5	22	31	31	
D - Income Tax Planning		Concepts and Mechanics of Exchanges	13.5		13		
D - Income Tax Planning		Corporate Tax Planning	21		21		
D - Income Tax Planning		Divorce Tax Planning	16	10	16		16
D - Income Tax Planning		Divorce Transfers & Settlements	2.5	1.5	2		2.5
D - Income Tax Planning		Earned Income Credit	4		4		
D - Income Tax Planning		Education Tax Benefits	5.5	4	5		
D - Income Tax Planning		EITC Due Diligence	2.5		2		
D - Income Tax Planning		Estate Planning: Tax Strategies	21.5	14.5	21		
D - Income Tax Planning		Estate Tax Planning	4	4	4		
D - Income Tax Planning		Family Tax Issues	2.5	2	2		
D - Income Tax Planning		Federal Income Tax Changes	5.5	4	5		
D - Income Tax Planning		Federal Tax Law: Retirement Plans, Pensions, Annuities	3	2	3	3	
D - Income Tax Planning		Financial Planning Tax Strategies	14.5	10	14		
D - Income Tax Planning		Gift Taxes	3		3		
D - Income Tax Planning		Guide to Federal Individual and Corporate Taxation	35	25.5	35		
D - Income Tax Planning		Health Savings Accounts	1.5	1	1		
D - Income Tax Planning		Home Office Deduction	3	2	3		
D - Income Tax Planning		Individual Filing Requirements	2		2		
D - Income Tax Planning		Individual Retirement Accounts-Tax	3		3	3	
D - Income Tax Planning		Information Security Basic Safeguards	6	0.5	1		
D - Income Tax Planning		Information Security: Networks	8	4.5	6		
D - Income Tax Planning		Information Security: Malware	6				
D - Income Tax Planning		Keeping Taxpayer Data Secure	2.5	2	2		
D - Income Tax Planning		Partnership Taxation	13.5	7.5	13		
D - Income Tax Planning		Passive Losses	10.5		10		
D - Income Tax Planning		Passthrough Business Deduction	2	1	2		

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D - Income Tax Planning		Real Estate Tax Planning	11	7.5	11		
D - Income Tax Planning		Retirement Planning Tax Strategies	17	12	17	17	
D - Income Tax Planning		Small Business Tax Planning	24.5	19	24		
D - Income Tax Planning		Tax Cut and Jobs Act Individual Tax Preparation	3.5		3		
D - Income Tax Planning		Tax Guide to Asset Protection	2		2		
D - Income Tax Planning		Tax Guide to Bankruptcy	2		2		
D - Income Tax Planning		Tax Guide to Business Expenses	2.5		2		
D - Income Tax Planning		Tax Guide to Compensation and Benefits	3	2	3		
D - Income Tax Planning		Tax Guide to Education Planning	2		2		
D - Income Tax Planning		Tax Guide to Estate Planning	2		2		
D - Income Tax Planning		Tax Guide to Partnerships	2.5		2		
D - Income Tax Planning		Tax Guide to Retirement Planning	3		3	3	
D - Income Tax Planning		Tax Guide to S Corporations	3		3		
D - Income Tax Planning		Tax Return Preparer Ethical Issues			2	2	
D - Income Tax Planning		Tax Treatment of Individual Retirement Plans	2.5		2	2	
D - Income Tax Planning		Tax-Cut-and-Jobs-Act Summary	4	3	4		
E - Ret. Planning & Employee Ben.		Individual Retirement Accounts	4.5	3.5			
E - Ret. Planning & Employee Ben.		Natalie Choate: Planning for Retirement Benefits		23.5			
E - Ret. Planning & Employee Ben.		Social Security, Medicare, & Government Pensions		13.5			
F - Estate Planning		Advisors Guide to Estate Planning	29	21			
F - Estate Planning		Executor's Guide		11			
G - Ethics of Financial Planning		CFP Board Ethics Course		2			
Elective Subject Areas							
A - Financial Planning Process		Advising Clients Divorcing After 50		9			9
A - Financial Planning Process		Child Custody and Support Course		9			
A - Financial Planning Process		Elder Planning		12			
A - Financial Planning Process		Essential Guide to Divorce for Advisors		14			14
A - Financial Planning Process		Interpretation of Financial Statements	11	7.5			
A - Financial Planning Process		Private Wealth Management		28			
A - Financial Planning Process		Succession Planning Strategies		4			
A - Financial Planning Process		What Advisors Should Know About Divorce		11.5			11.5
A - Financial Planning Process		What Advisors Should Know About Identity Theft		5			
A - Financial Planning Process		Women and Divorce-Financial Aspects Volume I		3.5			3.5
A - Financial Planning Process		Women and Divorce-Financial Aspects Volume II		5.5			5.5
H - Acctg, Cash Flow Mgmt., Budget.		Accountants Guidebook	30				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting Controls Guidebook	12				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Casinos and Gaming	10				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Changes and Error Corrections	1				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Derivatives and Hedges	3				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Earnings per Share	1				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Intangible Assets	1				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Inventory	13				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Investments	3				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Leases	2				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Liabilities	2.5				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Managers	18				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for Stock-Based Compensation	2				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting for the New Lease Standard	8				
H - Acctg, Cash Flow Mgmt., Budget.		Accounting Procedures Guidebook	11				
H - Acctg, Cash Flow Mgmt., Budget.		Accounts Receivable Best Practices	2.5				
H - Acctg, Cash Flow Mgmt., Budget.		Agricultural Accounting	10				
H - Acctg, Cash Flow Mgmt., Budget.		Bookkeeping Guidebook	15				
H - Acctg, Cash Flow Mgmt., Budget.		Budgeting A Comprehensive Guide	14				
H - Acctg, Cash Flow Mgmt., Budget.		Business Combinations and Consolidations	3				
H - Acctg, Cash Flow Mgmt., Budget.		Business Ratios Guidebook	16				
H - Acctg, Cash Flow Mgmt., Budget.		Capital Budgeting	5				

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H - Acctg, Cash Flow Mgmt., Budget.		Closing the Books	13				
H - Acctg, Cash Flow Mgmt., Budget.		Construction Accounting	11				
H - Acctg, Cash Flow Mgmt., Budget.		Corporate Cash Management	15				
H - Acctg, Cash Flow Mgmt., Budget.		Corporate Finance	15				
H - Acctg, Cash Flow Mgmt., Budget.		Cost Accounting Fundamentals	14				
H - Acctg, Cash Flow Mgmt., Budget.		Cost Management Guidebook	17				
H - Acctg, Cash Flow Mgmt., Budget.		Creating a Lean Accounting Department	14				
H - Acctg, Cash Flow Mgmt., Budget.		Credit and Collection Guidebook	14				
H - Acctg, Cash Flow Mgmt., Budget.		Current Developments in Acctg & Fin. Reporting	16				
H - Acctg, Cash Flow Mgmt., Budget.		Effective Internal Controls for Small Businesses	1.5				
H - Acctg, Cash Flow Mgmt., Budget.		Entertainment Industry Accounting	1				
H - Acctg, Cash Flow Mgmt., Budget.		Fair Value Accounting	2				
H - Acctg, Cash Flow Mgmt., Budget.		FASB Review	16				
H - Acctg, Cash Flow Mgmt., Budget.		FASB SSARS and SAS Update and Review	24				
H - Acctg, Cash Flow Mgmt., Budget.		Fixed Asset Accounting	12				
H - Acctg, Cash Flow Mgmt., Budget.		Foreign Currency Accounting	2				
H - Acctg, Cash Flow Mgmt., Budget.		Fraud Examination	12				
H - Acctg, Cash Flow Mgmt., Budget.		Fraud in the Workplace	1				
H - Acctg, Cash Flow Mgmt., Budget.		Fraud Overview for Accountants and Auditors	4				
H - Acctg, Cash Flow Mgmt., Budget.		Fraud Schemes	3				
H - Acctg, Cash Flow Mgmt., Budget.		GAAP Everything You Never Wanted to Know	16				
H - Acctg, Cash Flow Mgmt., Budget.		GAAP Guidebook	29				
H - Acctg, Cash Flow Mgmt., Budget.		Government Accounting	12				
H - Acctg, Cash Flow Mgmt., Budget.		Health Care Accounting	12				
H - Acctg, Cash Flow Mgmt., Budget.		Hospitality Accounting	19				
H - Acctg, Cash Flow Mgmt., Budget.		IFRS Guidebook	23				
H - Acctg, Cash Flow Mgmt., Budget.		Oil and Gas Accounting	9				
H - Acctg, Cash Flow Mgmt., Budget.		Optimal Accounting for Payables	1				
H - Acctg, Cash Flow Mgmt., Budget.		Partnership Accounting	1				
H - Acctg, Cash Flow Mgmt., Budget.		Payables Management	10				
H - Acctg, Cash Flow Mgmt., Budget.		Payroll Management	14				
H - Acctg, Cash Flow Mgmt., Budget.		Project Accounting	3				
H - Acctg, Cash Flow Mgmt., Budget.		Public Company Accounting and Finance	13				
H - Acctg, Cash Flow Mgmt., Budget.		Real Estate Accounting	10				
H - Acctg, Cash Flow Mgmt., Budget.		Revenue and Margin Analysis	1				
H - Acctg, Cash Flow Mgmt., Budget.		Revenue Recognition	4				
H - Acctg, Cash Flow Mgmt., Budget.		Sales and Use Tax Accounting	2				
H - Acctg, Cash Flow Mgmt., Budget.		Statement of Cash Flows	2				
H - Acctg, Cash Flow Mgmt., Budget.		The Balance Sheet	2				
H - Acctg, Cash Flow Mgmt., Budget.		The Income Statement	2				
H - Acctg, Cash Flow Mgmt., Budget.		The New Controller Guidebook	18				
H - Acctg, Cash Flow Mgmt., Budget.		The Soft Close	1				
H - Acctg, Cash Flow Mgmt., Budget.		The Year-End Close	3				
H - Acctg, Cash Flow Mgmt., Budget.		Impact of Tax Cuts and Jobs Act on GAAP	2				
H - Acctg, Cash Flow Mgmt., Budget.		Nonprofit Accounting	16				
J - Communications		Advising Couples		9			
J - Communications		Facilitating Financial Health		11			
J - Communications		Having the Money Talk with Clients		5			
M - Technology		Excel Tools and Tips for CPAs	3				
M - Technology		Excel Worksheets Best Practices	2				
Other Subjects **(Non NAPFA subjects - For consideration of other programs as Core Area CEs, submit information to NAPFA)**							
Accounting Ethics		Madoff A Case Study in AICPA Ethics	2				
(see our website for all state ethics courses)							
Auditing		New Audit Reporting Standards	10				
Auditing		Auditing Developments	16				
Auditing		How To Audit Equity	1				
Auditing		How To Audit Fixed Assets	2				

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Auditing		How To Audit Liabilities	1				
Auditing		How To Audit Revenue	2				
Auditing		How To Conduct a Compilation Engagement	1				
Auditing		How To Conduct a Review Engagement	1				
Auditing		Major Changes to Auditing Standards	8				
Auditing		Compilation and Review Standards	12				
Auditing		Practice Issues Compilation and Review Update	20				
Business Mgt & Organization		Change Management	3				
Business Mgt & Organization		Developing and Managing Teams	4				
Business Mgt & Organization		MBA Guidebook	21				
Business Mgt & Organization		Negotiation	5				
Business Mgt & Organization		Project Management	14				
Business Mgt & Organization		Records Management	3				
Finance		CFO Guidebook	22				
Finance		Enterprise Risk Management	10				
Finance		Financial Analysis A Business Decision Guide	19				
Finance		Financial Forecasting and Modeling	5				
Finance		Investor Relations Guidebook	14				
Finance		Mergers and Acquisitions	19				
Finance		Revenue Management	3				
Finance		Treasurer's Guidebook	16				
Finance		Working Capital Management	5				
Personal Development		7 Habits of Effective CEOs	1				
Personal Development		7 Habits of Effective CFOs	1				
Personal Development		7 Habits of Effective Controllers	1				
Personal Development		Conflict Management	4				
Personal Development		How to Run a Meeting	2				
Personnel/HR		Coaching and Mentoring	3				
Personnel/HR		Employee Onboarding	2				
Personnel/HR		Human Resources Guidebook	20				
Personnel/HR		Performance Appraisals	2				
Personnel/HR		Recruiting and Hiring	4				
Personnel/HR		Succession Planning	3				
Production		Constraint Management Guidebook	10				
Production		Inventory Management	15				
Production		Purchasing Guidebook	14				