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Purchasing Courses

Do I need to set up an account to purchase a course?

Yes. Having an online account will give you anytime access to your courses, online exams, certificates of completion, courses and exams in progress, and courses and exams completed.

Can I purchase a course by phone?

Yes. Call us during business hours (EST) and we will take your order over the phone. We will also set up an account for you on our Website. You will receive temporary login information via Email, which you can change after you login for the first time. Once your account is created, you will be able to view a PDF copy of your course(s) and take an exam online.

Can I purchase a printed copy of a course?

Yes. All courses are available in print format. We ship courses within twenty-four hours on business days. You have the option of receiving your course(s) via next day, second day, or regular shipping. Shipping charges are shown at checkout. Exams can be completed online.

Do you offer individual or group discounts?

Yes. If you purchase three or more courses in one order, you receive an automatic 18% off. We also put selected courses on sale from time to time. We can provide you with a group/corporate discount coupon code if you have several individuals in your office or company who need continuing education. Please contact our office for more information: 800-588-7039.

Can I purchase courses for other individuals under my account?

Yes. Purchase all the courses at once, using your credit card and shipping information.

Each individual taking a course needs to set up an account/login and go to the My Courses page. From there, click on the Locate My Order link and enter the course number and the order number or the Email address of the individual who originally purchased the courses. Once the course is selected, it is posted to that individual's account.

For courses order in print (and mailed), please provide us, via Email or phone, the shipping addresses as needed, if they are different that the address entered in the original order.

Can I purchase extra exams for others in my office to take?

Not at this time. However, if three or more individuals wish to take a course, you can purchase all the courses at one time to earn an 18% discount. The names of the individuals taking the course(s) will need to be provided to us via a link on the My Courses page of the individual who purchased the courses.

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If I purchase a course and it is updated at a later date, can I obtain the updated edition?

Yes. Upon request, we will post an updated PDF of your course in your account at no charge. If you originally purchased a printed version of the course, the updated edition will be made available to you as a PDF.

How do I receive a purchase receipt?

Purchase receipts appear online after the credit card payment is made. A copy of the receipt is also Emailed to you.

Can I exchange a course for another?

Yes (As long as the exam has not been completed). Contact us by Email or phone.

What is Beacon Hill's return policy?

You may return any course within 30 days of purchase (and before you complete the exam) for a full refund (you can also exchange a course for another of equal value).

For more information regarding administrative, complaint, and refund policies, please contact the customer service manager at our offices by phone: 800-588-7039 or by E-mail: contact@bhfe.com.

Taking an Exam

How long do I have to complete an exam?

One year. If you don't complete the exam in one year, just contact us to see if there is an updated version of the course. If there is, we will make a PDF of the course available to you free of charge and you will have another year to complete the course.

Can I obtain a copy of an exam to view offline?

Exams may be printed. Open the exam for your course and click the green "Print Exam" button at the bottom of the first page of the exam. You can print individual pages of an exam by opening the Print Preview from the File menu (Internet Explorer browser). In the print menu, select the pages you wish to print.

What happens if I do not pass an exam?

The online grading program allows three attempts to pass an exam. There is no charge for retakes. If you do not pass an exam in three attempts, please contact us and we will reset the grading program to give you additional attempts.

Can I find out which exam questions I got wrong?

Yes. Once an exam is completed, there is a link to open the certificate of completion for your course and a link to view the results, showing the correct and incorrect answers.

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Can I start an exam, then leave and go back to it later?

Yes. On each page of an exam, there is a green button: "Save and Leave Exam for Later." This saves the work you have done to date. Later, you can resume the exam using the link on the My Courses page.

How many questions are on an exam for a given course?

Generally, NASBA (CPA) and IRS (EA, ERPA, RTRP) courses are required to have five exam questions per credit-hour. CFP® credit courses are required to have ten exam questions per credit-hour. The number of questions may be lower if the exam includes application-related questions.

Can I obtain a copy of an exam to view offline?

Exams may be printed. Open the exam for your course and click the green "Print Exam" button at the bottom of the first page of the exam. You can print individual pages of an exam by opening the Print Preview from the File menu (Internet Explorer browser). In the print menu, select the pages you wish to print.

I purchased a printed course. How do I take the exam online?

Log into your account, go to *My Courses*, and view your course and its corresponding exam. Open the exam link to proceed.

Can I fax in my exam answer sheet instead of completing the exam online?

Yes, for courses purchased in print format only. The faxable exam answer sheet is located on the second-to-last page of the course document. However, we encourage you to use the online exam program. This enables you to receive instant results and certificate of completion. If you fax in your exam for grading, we will manually update your online account for you if one has been created.

Can I print my certificate of completion?

Yes. Once an exam is successfully completed, a link to open the certificate is posted next to your course on the *My Courses* page. You can also view the results of your exam showing the correct and incorrect answers. The certificate of completion will remain available to you in your account, should you need to obtain a copy at a later date.

What if I need a certificate from a course I completed in the past?

Once an exam is successfully completed, a link to open the certificate is posted next to your course on the *My Courses* page. The certificate of completion will remain available to you in your account, should you need to obtain a copy at a later date.

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Technical Information

Do I need special software to view courses and exams?

You only need Adobe Reader to view a PDF of a course. Otherwise, no special software is required (other than an Internet connection).

Can I access my courses and exams from another computer?

Yes. As long as you have Internet Access, you can log into your account from any computer or other mobile device.

Can I view course-PDFs through my mobile device?

Yes, as long as you have Adobe Reader loaded on the device.

Will the online exam program work with my mobile device?

Customers from our Old Website

I purchased a course from the old Website. Can I take my exam online from the new Website?

Yes. Call us during business hours (EST) and we will set up an account for you on the new Website. You will receive temporary login information via Email, which you can change after you login for the first time. Once your account is created, you will be able to view a PDF copy of your course(s) and take an exam online.

I created an account on the old Website. Will this account information and course history carry over to the new site?

Yes. Call us during business hours (EST) and we will set up an account for you on the new Website. You will receive temporary login information via Email, which you can change after you login for the first time. Once your account is created, you will be able to view a PDF copy of your course(s) and take an exam online.

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CE/CPE/Course Approval Information

How many credit hours I need?

For CPA CPE: consult your state's [CPE requirements](#).

For CFP® CE: Thirty hours every two years, two of which need to be from a CFP Board-approved ethics course (see our CFP Board Ethics course). You can take the non-ethics courses in any of the approved CFP Board [Principal Topics](#). Also see the CFP Board [Continuing Education Policies](#).

NAPFA CE: Same as CFP, but with specific credit hour requirements for designated topic areas. See our NAPFA Subject Areas document for a credit by subject area breakdown for our courses. Also see [NAPFA](#) for specific CE requirements.

For [IRS CE](#):

Enrolled Agents:

- Obtain 72 hours every three years (based on your renewal cycle)
- Obtain a minimum of 16 hours per year (2 of which must be on ethics)

For Enrolled Retirement Plan Agents:

- Obtain 72 hours every three years (based on your renewal cycle – [view the chart](#))
- Obtain a minimum of 16 hours per year (2 of which must be on ethics or professional conduct)

For Registered Tax Return Preparers:

The IRS is initiating a voluntary RTRP program similar to the former mandatory program beginning in the 2015 tax season (1st quarter of 2015). The enticement will be the IRS award of a certificate, enabling the tax preparer to call himself/herself "certified." The annual requirement will be for 18 CE hours from an IRS approved provider. Since this year is getting off to a late start, the CE will be prorated and will only require 11 total hours in 2014, comprised of the following:

- The Annual Federal Tax Refresher (AFTR) course - 6 hours
- Federal tax law - 3 hours
- Ethics - 2 hours

We are developing the AFTR course now, it will be available this summer (2014).

Will Beacon Hill report my credits?

CFP Board credit: Yes. We report credits every Tuesday and after the end of each month.

IMPORTANT NOTICE:

If you are completing a course within two weeks of your license renewal date, you will need to enter your credits manually in your account on the Board's website before the end of the month. We will also report your credits to the Board. However, the Board can take up to a week to transfer the credit information from our report into their database.

To enter your credits, go to:

http://www.cfp.net/log-in?utm_source=login&utm_medium=header&utm_content=homepage&utm_campaign=

IMPORTANT: When reporting your credits, only enter the word Beacon in the Sponsor Name field, not the entire name (Beacon Hill Financial Educators).

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EA/RTRP/ERPA credit: Yes. We report credits every Tuesday and after the end of each month.

CPA credit: No. You report your credit as part of your license renewal process. Consult your state board of accountancy for details.

Can I repeat a course in a subsequent renewal cycle?

Yes. Most of our courses are updated annually and, as a result, provide new and updated information on the topic. Also, NASBA, CFP Board, and the IRS no restrictions on repeating courses in subsequent license renewal periods.

Are your courses approved in my state?

CPA, CFP Board, and IRS CPE courses qualify for credit in all states. Note that several state boards of accountancy require an ethics course that must be pre-approved by the state. We have obtained approval for these courses as necessary. You can take these courses in subsequent renewal cycles as they are updated annually.

Are your courses approved for state insurance credit?

No, unless your state specifically allows courses that carry CPA, CFP®, or IRS credit. Consult your state's insurance CE policy for more information.

Will my CE credits count toward my PACE recertification?

Yes. **PACE** accepts courses that carry CFP® and CPA credits. This includes the three-hour ethics requirement (see our CFP Board Ethics course #1001, dual credit, which carries 2 CFP credits and 3 CPA credits. You can count the 3 CPA credits toward the requirement.)

Security and Privacy

Do you store my credit card information on your site?

No. Credit card information is passed directly to our credit card merchant services partner for processing. You will need to re-enter your credit card information each time you order a course. However, we do retain your shipping and credit card billing address information.

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How secure is your Website?

BHFE.com is fully secured as an e-commerce website.

Website/Internet security through GeoTrust: Sites secured by GeoTrust SSL certificates are providing up to 256 bit encryption thereby offering the highest level of encryption and security possible. This means you can rest assured that communications between your browser and this site's web servers are private and secure (see our GeoTrust security certificate information on our Home page).

e-Commerce/credit card processing and identity security through Trustwave: We comply with the Payment Card Industry Data Security Standards (PCI DSS). Your credit card and identity information are secure (see our Trustwave security information on our Home page).

What is Beacon Hill's privacy policy?

The personal information you submit to Beacon Hill Financial Educators, Inc and/or www.bhfe.com, will not be shared, sold, or disclosed to third parties in any form, for any purpose, unless required as part of the order-fulfillment or credit-reporting process. Beacon Hill Financial Educators, Inc. will not disclose your sales history to third parties for any purpose, at any time. On occasion, we will send you regular mail promotions on new courses, special sales, etc. This is done infrequently (quarterly at most). We do not send Email marketing messages.

If you have any questions regarding our privacy policy, contact us at 800-588-7039, or contact@bhfe.com.

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