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How to Run a Meeting	2
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Accounting for Investments	3
Business Valuation	3
Tools & Tips for CPAs Using Excel	3
Fraud Overview for Accountants	4
Financial Forcasting and Modeling	5
Negotiation	5
Major Changes to Auditing Standards	8
Enterprise Risk Management	10
Accounting Procedures Guidebook	11
Interpretation of Financial Statements	11
Making Money:Special Engagements	12
Consol. of Var. Interest Entity Rules	12
Health Care Accounting	12
Accounting Controls Guidebook	12
Closing the Books	13
Create a Lean Acctg Department	13
Public Company Acctg & Finance	13
Closing the Books	13

	CPE
Budgeting: Comprehensive Gde	14
Corporate Cash Management	14
Cost Accounting Fund.	14
Invester Relations Guidebook	14
Payroll Management	14
Bookkeeping Guidebook	15
Payroll Management	15
Acctg. & Fin.Reporting	16
Auditing Developments	16
Non-Profit Accounting	16
Cost Management Guidebook	17
Accounting for Managers	17.5
New Controller Guidebook	18
Financial Analysis	19
Human Resources Guidebook	19
Mergers and Acquisitions	19
Compliation & Review Engmts	20
Human Resources Guidebook	20
MBA Guidebook	21.5
CFO Guidebook	22
IFRS Guidebook 2019	23
FASB, SSARS, SAS Update	24
GAAP Guidebook 2019	28
Accountants' Guidebook	30

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	CFP® CE
Women and Divorce: Financial Aspects Vol. I	3.5
Succession Planning Strategies	4
Having the "Money Talk" with Clients (Comm)	4.5
What Advisors Should Know About I.D. Theft	5
Women and Divorce: Financial Aspects Vol. II	5.5
What Advisors Should Know/Psych. of Invest.	7
Advising Couples (NAPFA: Communication)	9
Advising Clients Divorcing After 50	9
Child Custody and Suypport Course	9
What Advisors Should Know About Divorce	11.5
What Advisors Should Know/Fundamental Analysis	10
Executor's Guide	11
Elder Planning	12
Social Security, Medicare, & Government Pensions	13.5
Asset Allocation -_Gibson	14
Natalie Choate-Planning for Retirement Benefits	16
Private Wealth Management - Hallman/Rosenbloom	28

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idfa Institute for Divorce Financial Analysts

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We report CFP® and IRS credits.

Q1

Short Financial Planning Courses

	CFP®	CPA
Health Savings Accounts	1	1.5
Business Valuation	2	3
Personal Life Insurance Planning	2.5	4
Annuities	4.5	6
Individual Retirement Accounts	3.5	4.5
Long-Term Care Planning	4.5	6
Interpretation of Financial Statements	7.5	11

Long Financial Planning Courses

	CFP®	CPA
Advisor's Guide to Planning for Baby Boomer	7	-
Facilitating Financial Health	11	-
Advisor's Guide to Estate Planning	21	29
Advisor's Guide to Investment Planning	28	36

Long Tax Courses (Updated Annually)

	CFP®	CPA	IRS
Asset Protection Tax Strategies	12	17.5	17
Comprehensive Tax Course: Ret.Plan.	22	31.5	31
Concepts & Mechanics of Exchanges	-	13.5	13
Corporate Tax Planning	-	21	21
Divorce Tax Planning	9	16	16
Estate Planning: Tax Strategies	14.5	21.5	21
Financial Planning:Tax Strategies	10	14.5	14
Guide to Federal Indiv & Corp. Tax.	25.5	35	35
Partnership Taxation	7.5	13.5	13
Passive Losses	-	10.5	10
Real Estate Tax Planning	7.5	11	11
Retirement Planning: Tax Strategies	12	17	17
Small Business Tax Planning	18.5	24	24
1040 Workshop	20	28	28

Short Tax Courses (Updated Annually)

	CFP®	CPA	IRS
Affordable Care Act (Tax Guide)	1	1.5	1
2019 Federal Income Tax Changes	4	5.5	5
Auto Rules	-	2	2
Bankruptcy (Tax Guide)	-	2.5	2
Business Entities (Tax Guide)	2.5	3.5	3
Business Travel & Entertainment	-	2	2
Business Expenses (Tax Guide)	-	2.5	2
Compensation & Benefits (Tax Guide)	2	3	3
Corporations (Tax Guide)	-	2	2
Divorce Transfers & Settlements	1.5	2	2
Earned Income Credit	-	4	4
Earned Income Tax Credit: Due Dilig	-	2.5	2
Education Planning (Tax Guide)	1.5	2.5	2
Education Tax Benefits	3.5	5	5
Estate Planning (Tax Guide)	1	2	2
Estate Tax Planning	3	4	4
Family Tax Issues	2	2.5	2
ACA Tax Provisions	-	5	5
Home Office Deduction	2	3.5	3
Individual Retirement Plans (Tax)	-	2.5	2
Installment Sales	-	2	2
Keeping Taxpayer Data Secure	2	2.5	2
Life Insurance Proceeds (Fed.Tax Law)	-	3	3
Medical, Charitable, Casualty	-	2.5	2
Passive Loss & At-Risk Rules-	-	2.5	2
Passthrough Business Deduction	1	2	2
Property Dispositions	-	2	2
Retirement Plans, Pensions,Annuities	2	3	3
Selected Legal Issues withTax Anal	-	2	2
S-Corporations (Tax Guide)	1.5	2.5	2
Retirement Planning (Tax Guide)	2	3	3

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