



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 1/1/18 thru 12/31/19:
 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 | BHFE Course # | Title | Credit Hours by License: | CPA | CFP® | EA OTRP | ERPA | CDFA |
|---|---------------|--|--------------------------|------|------|---------|------|------|
| Use highest credit applicable to your other license(s) | | | | | | | | |
| Core Subject Areas | | | | | | | | |
| B - Insurance & Risk Management | 366019 | Business Insurance Overview | | 3 | 2 | | | |
| B - Insurance & Risk Management | 290819 | Long Term Care Planning | | 6 | 4.5 | | | |
| B - Insurance & Risk Management | 290419 | Personal Life Insurance Planning | | 4 | 2.5 | | | |
| C - Investments | 2958192 | Advisor's Guide to Investment Planning | | 36 | 28 | | | |
| C - Investments | 290119 | Annuities | | 6 | 4.5 | | | |
| C - Investments | 142119 | Asset Allocation-Balancing Financial Risk | | | 14 | | | |
| C - Investments | 365619 | Business Valuation | | 3 | 2 | | | |
| C - Investments | 195019 | What Advisors Should Know About Fundamental Analysis | | | 10 | | | |
| C - Investments | 193619 | What Advisors Should Know About Psychology of Investing | | | 7 | | | |
| D - Income Tax Planning | 496619 | 1040 Workshop-2019 | | 28 | 20 | 28 | | |
| D - Income Tax Planning | 700219 | 2019 Comprehensive Tax Update | | 30 | | 30 | | |
| D - Income Tax Planning | 700119 | 2019 Tax Update-Must Know Provisions | | 20 | | 20 | | |
| D - Income Tax Planning | 491819 | 2019-2018 Federal Income Tax Update | | 6.5 | 5 | 6 | | |
| D - Income Tax Planning | 292119 | Affordable Care Act Employer Mandate | | 3.5 | | 3 | | |
| D - Income Tax Planning | 292019 | Affordable Care Act Individual Rights and Responsibilities | | 2 | | 2 | | |
| D - Income Tax Planning | 291419 | Affordable Care Act Tax Provisions | | 5 | | 5 | | |
| D - Income Tax Planning | 292419 | Annual Tax Season Update-2020 | | 9 | | 9 | | |
| D - Income Tax Planning | 490119 | Asset Protection Tax Strategies | | 17.5 | 12 | 17 | | |
| D - Income Tax Planning | 492219 | Auto Rules | | 2 | | 2 | | |
| D - Income Tax Planning | 492319 | Business Travel and Entertainment | | 2 | | 2 | | |
| D - Income Tax Planning | 4960182 | Comprehensive Tax Course on Retirement Planning | | 31.5 | 22 | 31 | 31 | |
| D - Income Tax Planning | 496118 | Concepts and Mechanics of Exchanges | | 13.5 | | 13 | | |
| D - Income Tax Planning | 496219 | Corporate Tax Planning | | 21 | | 21 | | |
| D - Income Tax Planning | 491018 | Divorce Tax Planning | | 16 | 10 | 16 | | 16 |
| D - Income Tax Planning | 492419 | Divorce Transfers & Settlements | | 2.5 | 1.5 | 2 | | 2.5 |
| D - Income Tax Planning | 291619 | Earned Income Credit | | 4 | | 4 | | |
| D - Income Tax Planning | 291319 | Education Tax Benefits | | 5 | 4 | 5 | | |
| D - Income Tax Planning | 291919 | EITC Due Diligence | | 2.5 | | 2 | | |
| D - Income Tax Planning | 491119 | Estate Planning: Tax Strategies | | 21.5 | 14.5 | 21 | | |
| D - Income Tax Planning | 290319 | Estate Tax Planning | | 4 | 4 | 4 | | |
| D - Income Tax Planning | 491519 | Family Tax Issues | | 2.5 | 2 | 2 | | |
| D - Income Tax Planning | 291719 | Federal Income Tax Changes-2019 | | 5.5 | 4 | 5 | | |
| D - Income Tax Planning | 290919 | Federal Tax Law: Retirement Plans, Pensions, Annuities | | 3 | 2 | 3 | 3 | |
| D - Income Tax Planning | 291119 | Federal Tax Law-Life Insurance Proceeds | | 3 | | 3 | | |
| D - Income Tax Planning | 4905182 | Financial Planning Tax Strategies | | 14.5 | 10 | 14 | | |
| D - Income Tax Planning | 700519 | Gift Taxes | | 3 | | 3 | | |
| D - Income Tax Planning | 491919 | Guide to Federal Individual and Corporate Taxation | | 35 | 25.5 | 35 | | |
| D - Income Tax Planning | 298619 | Health Savings Accounts | | 1.5 | 1 | 1 | | |
| D - Income Tax Planning | 291819 | Home Office Deduction | | 3.5 | 2 | 3 | | |
| D - Income Tax Planning | 700719 | Individual Filing Requirements | | 2 | | 2 | | |
| D - Income Tax Planning | 700619 | Individual Retirement Accounts-Tax | | 3 | | 3 | 3 | |
| D - Income Tax Planning | 7006219 | Individual Retirement Accounts-Tax (Video) | | 4 | | 4 | 4 | |
| D - Income Tax Planning | 7008219 | Information Security Basic Safeguards (Video) | | 1 | 0.5 | 1 | | |
| D - Income Tax Planning | 700819 | Information Security: Basic Safeguards | | 6 | 4.5 | 6 | | |
| D - Income Tax Planning | 492519 | Installment Sales | | 2 | | 2 | | |
| D - Income Tax Planning | 2922182 | Keeping Taxpayer Data Secure | | 2.5 | 2 | 2 | | |
| D - Income Tax Planning | 492619 | Medical Charitable and Casualty | | 2.5 | | 2 | | |
| D - Income Tax Planning | 492719 | Partnership Taxation | | 13.5 | 7.5 | 13 | | |
| D - Income Tax Planning | 492919 | Passive Loss and At Risk Rules | | 2.5 | | 2 | | |
| D - Income Tax Planning | 492818 | Passive Losses | | 10.5 | | 10 | | |
| D - Income Tax Planning | 4967192 | Passthrough Business Deduction | | 2 | 1 | 2 | | |

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| D - Income Tax Planning | 493019 | Property Dispositions | | | 2 | | 2 | | |
| D - Income Tax Planning | 490819 | Real Estate Tax Planning | | | 11 | 7.5 | 11 | | |
| D - Income Tax Planning | 495918 | Retirement Planning Tax Strategies | | | 17 | 12 | 17 | 17 | |
| D - Income Tax Planning | 495319 | Small Business Tax Planning | | | 24.5 | 18.5 | 24 | | |
| D - Income Tax Planning | 292319 | Tax Cut and Jobs Act Individual Tax Preparation | | | 3.5 | | 3 | | |
| D - Income Tax Planning | 490219 | Tax Guide to Asset Protection | | | 2 | 1.5 | 2 | | |
| D - Income Tax Planning | 491619 | Tax Guide to Bankruptcy | | | 2 | | 2 | | |
| D - Income Tax Planning | 493519 | Tax Guide to Business Expenses | | | 2.5 | | 2 | | |
| D - Income Tax Planning | 490419 | Tax Guide to Compensation and Benefits | | | 3 | 2 | 3 | | |
| D - Income Tax Planning | 493319 | Tax Guide to Corporations | | | 2 | | 2 | | |
| D - Income Tax Planning | 491319 | Tax Guide to Education Planning | | | 2.5 | 1.5 | 2 | | |
| D - Income Tax Planning | 493419 | Tax Guide to Estate Planning | | | 2.5 | 2 | 2 | | |
| D - Income Tax Planning | 490719 | Tax Guide to Interest and Debt | | | 2.5 | | 2 | | |
| D - Income Tax Planning | 493119 | Tax Guide to Partnerships | | | 2.5 | | 2 | | |
| D - Income Tax Planning | 490919 | Tax Guide to Retirement Planning | | | 3 | 2 | 3 | 3 | |
| D - Income Tax Planning | 493219 | Tax Guide to S Corporations | | | 3 | 1.5 | 3 | | |
| D - Income Tax Planning | 600219 | Tax Return Preparer Ethical Issues | | | | | 2 | 2 | |
| D - Income Tax Planning | 291019 | Tax Treatment of Individual Retirement Plans | | | 2.5 | | 2 | 2 | |
| D - Income Tax Planning | 491719 | Tax-Cut-and-Jobs-Act Summary | | | 4 | 3 | 4 | | |
| E - Ret. Planning & Employee Ben. | 295319 | Advisor's Guide to Planning for the Baby Boomer Client | | | | 7 | | | |
| E - Ret. Planning & Employee Ben. | 194019 | Conserving Client Portfolios During Retirement | | | | 6 | | | |
| E - Ret. Planning & Employee Ben. | 290519 | Individual Retirement Accounts | | | 4.5 | 3.5 | | | |
| E - Ret. Planning & Employee Ben. | 111719 | Natalie Choate: Planning for Retirement Benefits | | | | 23.5 | | | |
| E - Ret. Planning & Employee Ben. | 190819 | Social Security, Medicare, & Government Pensions | | | | 13.5 | | | |
| F - Estate Planning | 296019 | Advisors Guide to Estate Planning | | | 29 | 21 | | | |
| F - Estate Planning | 195719 | Executor's Guide | | | | 11 | | | |
| G - Ethics of Financial Planning | 100118 | CFP Board Ethics Course | | | | 2 | | | |

Elective Subject Areas

| | | | | | | | | | |
|-------------------------------------|---------|--|--|--|-----|------|--|--|------|
| A - Financial Planning Process | 1956192 | Advising Clients Divorcing After 50 | | | | 9 | | | 9 |
| A - Financial Planning Process | 195519 | Child Custody and Support Course | | | | 9 | | | |
| A - Financial Planning Process | 194819 | Elder Planning | | | | 12 | | | |
| A - Financial Planning Process | 195819 | Essential Guide to Divorce for Advisors | | | | 14 | | | 14 |
| A - Financial Planning Process | 3636182 | Interpretation of Financial Statements | | | 11 | 7.5 | | | |
| A - Financial Planning Process | 194219 | Private Wealth Management | | | | 28 | | | |
| A - Financial Planning Process | 195219 | Succession Planning Strategies | | | | 4 | | | |
| A - Financial Planning Process | 194319 | What Advisors Should Know About Divorce | | | | 11.5 | | | 11.5 |
| A - Financial Planning Process | 193919 | What Advisors Should Know About Identity Theft | | | | 5 | | | |
| A - Financial Planning Process | 195319 | Women and Divorce-Financial Aspects Volume I | | | | 3.5 | | | 3.5 |
| A - Financial Planning Process | 195419 | Women and Divorce-Financial Aspects Volume II | | | | 5.5 | | | 5.5 |
| H - Acctg, Cash Flow Mgmt., Budget. | 361717 | Accountants Guidebook | | | 30 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360118 | Accounting Controls Guidebook | | | 12 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 366319 | Accounting for Casinos and Gaming | | | 10 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364718 | Accounting for Changes and Error Corrections | | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363518 | Accounting for Derivatives and Hedges | | | 3 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 293618 | Accounting for Digital Assets in Estate Planning | | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364218 | Accounting for Earnings per Share | | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 367219 | Accounting for Intangible Assets | | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360218 | Accounting for Inventory | | | 13 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362719 | Accounting for Investments | | | 3 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364319 | Accounting for Leases | | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 350416 | Accounting for Liabilities | | | 2.5 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360819 | Accounting for Managers | | | 18 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364818 | Accounting for Stock-Based Compensation | | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 313219 | Accounting for the New Lease Standard-2019 | | | 8 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360918 | Accounting Procedures Guidebook | | | 11 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 292918 | Accounts Receivable Best Practices | | | 2.5 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 367516 | Agricultural Accounting | | | 10 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 3503 | Asset Valuation Using Discounted Cash Flows | | | 1.5 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363017 | Bookkeeping Guidebook | | | 15 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362217 | Budgeting A Comprehensive Guide | | | 14 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363418 | Business Combinations and Consolidations | | | 3 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362317 | Business Ratios Guidebook | | | 16 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364418 | Capital Budgeting | | | 5 | | | | |

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|--|---------------|---|--------------------------|-----|------|---------|------|-------------|
| H - Acctg, Cash Flow Mgmt., Budget. | 361418 | Closing the Books | | 13 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368117 | Construction Accounting | | 10 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362117 | Corporate Cash Management | | 14 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 3631 | Corporate Finance | | 15 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 361319 | Cost Accounting Fundamentals | | 14 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 361517 | Cost Management Guidebook | | 17 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 361117 | Creating a Lean Accounting Department | | 14 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362517 | Credit and Collection Guidebook | | 14 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 312319 | Current Developments in Acctg & Fin. Reporting 2019 | | 16 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 293417 | Effective Internal Controls for Small Businesses | | 1.5 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 369718 | Entertainment Industry Accounting | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364118 | Fair Value Accounting | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 312119 | FASB Review-2019 | | 16 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 3120192 | FASB SSARS and SAS Update and Review 2019 | | 24 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 361017 | Fixed Asset Accounting | | 12 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363718 | Foreign Currency Accounting | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 366619 | Fraud Examination | | 12 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 350218 | Fraud in the Workplace | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 3030 | Fraud Overview for Accountants and Auditors | | 4 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368517 | Fraud Schemes | | 3 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 312519 | GAAP Everything You Never Wanted to Know | | 16 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360319 | GAAP Guidebook 2019 | | 29 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 365419 | Government Accounting | | 12 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368317 | Health Care Accounting | | 12 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363318 | Hospitality Accounting | | 19 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360419 | IFRS Guidebook 2019 | | 23 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 3501 | Intangible Asset Valuation | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368618 | Oil and Gas Accounting | | 9 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368718 | Optimal Accounting for Cash | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368818 | Optimal Accounting for Payables | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 366919 | Partnership Accounting | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363817 | Payables Management | | 10 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 360719 | Payroll Management | | 14 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 363217 | Project Accounting | | 3 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362917 | Public Company Accounting and Finance | | 13 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364018 | Real Estate Accounting | | 10 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 2928 | Revenue and Margin Analysis | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 361617 | Revenue Recognition | | 4 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 368017 | Sales and Use Tax Accounting | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 365518 | Statement of Cash Flows | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 369318 | The Balance Sheet | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 369518 | The Income Statement | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 362017 | The New Controller Guidebook | | 18 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364618 | The Soft Close | | 1 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 364518 | The Year-End Close | | 3 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 313319 | Impact of Tax Cuts and Jobs Act on GAAP 2019 | | 2 | | | | |
| H - Acctg, Cash Flow Mgmt., Budget. | 361217 | Nonprofit Accounting | | 16 | | | | |
| J - Communications | 194719 | Advising Couples | | | 9 | | | |
| J - Communications | 295919 | Facilitating Financial Health | | | 11 | | | |
| J - Communications | 195119 | Having the Money Talk with Clients | | | 4.5 | | | |
| M - Technology | 293117 | Excel Time Value of Money Functions for CPAs | | 2 | | | | |
| M - Technology | 292617 | Excel Tools and Tips for CPAs | | 3 | | | | |
| M - Technology | 293017 | Excel Worksheets Best Practices | | 2 | | | | |
| M - Technology | 293218 | Optimizing Search Results with Google | | 1 | | | | |
| M - Technology | 293317 | Spreadsheet Controls Under Sarbanes-Oxley Sec. 404 | | 1.5 | | | | |
| M - Technology | 2927 | Working with Downloaded Text Data in Excel | | 1 | | | | |
| Other Subjects (Non NAPFA subjects - For consideration of other programs as Core Area CEs, submit information to NAPFA) | | | | | | | | |
| Accounting Ethics | 292518 | Madoff A Case Study in AICPA Ethics | | 2 | | | | |
| (see our website for all state ethics courses) | | | | | | | | |
| Auditing | 293518 | Fraud Audit Techniques Using Excel | | 1.5 | | | | |
| Auditing | 312219 | Auditing Developments | | 16 | | | | |
| Auditing | 369118 | How To Audit Equity | | 1 | | | | |
| Auditing | 368417 | How To Audit Fixed Assets | | 2 | | | | |

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| Auditing | 369218 | How To Audit Liabilities | | 1 | | | | |
| Auditing | 369018 | How To Audit Revenue | | 2 | | | | |
| Auditing | 369818 | How To Conduct a Compilation Engagement | | 1 | | | | |
| Auditing | 369918 | How To Conduct a Review Engagement | | 1 | | | | |
| Auditing | 312819 | Major Changes to Auditing Standards | | 8 | | | | |
| Auditing | 313119 | New Compilation and Review Standards SSARS No 21-24 | | 10 | | | | |
| Auditing | 312719 | Practice Issues Compilation and Review Update 2019 | | 20 | | | | |
| Business Mgt & Organization | 366719 | Change Management | | 3 | | | | |
| Business Mgt & Organization | 365318 | Developing and Managing Teams | | 4 | | | | |
| Business Mgt & Organization | 366419 | MBA Guidebook | | 21 | | | | |
| Business Mgt & Organization | 367616 | Negotiation | | 5 | | | | |
| Business Mgt & Organization | 367319 | Project Management | | 14 | | | | |
| Business Mgt & Organization | 366519 | Records Management | | 3 | | | | |
| Finance | 362417 | CFO Guidebook | | 22 | | | | |
| Finance | 364918 | Enterprise Risk Management | | 10 | | | | |
| Finance | 362617 | Financial Analysis A Business Decision Guide | | 19 | | | | |
| Finance | 365118 | Financial Forecasting and Modeling | | 5 | | | | |
| Finance | 361817 | Investor Relations Guidebook | | 14 | | | | |
| Finance | 360618 | Mergers and Acquisitions | | 19 | | | | |
| Finance | 369618 | Revenue Management | | 3 | | | | |
| Finance | 365218 | Treasurer's Guidebook | | 16 | | | | |
| Finance | 365018 | Working Capital Management | | 5 | | | | |
| Personal Development | 366817 | 7 Habits of Effective CEOs | | 1 | | | | |
| Personal Development | 367019 | 7 Habits of Effective CFOs | | 1 | | | | |
| Personal Development | 367119 | 7 Habits of Effective Controllers | | 1 | | | | |
| Personal Development | 367817 | Conflict Management | | 4 | | | | |
| Personal Development | 367419 | How to Run a Meeting | | 2 | | | | |
| Personnel/HR | 366219 | Coaching and Mentoring | | 3 | | | | |
| Personnel/HR | 367716 | Employee Onboarding | | 2 | | | | |
| Personnel/HR | 362819 | Human Resources Guidebook | | 20 | | | | |
| Personnel/HR | 369418 | Performance Appraisals | | 2 | | | | |
| Personnel/HR | 366118 | Recruiting and Hiring | | 4 | | | | |
| Personnel/HR | 368217 | Succession Planning | | 3 | | | | |
| Production | 361917 | Constraint Management Guidebook | | 10 | | | | |
| Production | 360518 | Inventory Management | | 15 | | | | |
| Production | 363918 | Purchasing Guidebook | | 14 | | | | 7/1/2019 |