

Getting Certified Financial Planner (CFP) Credit for Attending an Event like the GEAR UP 1040

If you want to apply the CPE credits you earn at the GEAR UP 1040 for Certified Financial Planning credit requirements, follow this procedure:

Go to www.cfp.net and hover over the “For CFP Professionals” button on the main toolbar running across the page. This opens a pulldown menu, where you click Continuing Education.

On the “Continuing Education Page,” scroll down and click “find a CE program.” Type in Gear Up in the “Search by Sponsor” box and click the yellow “search” button at the bottom of the page. This opens a page listing the Gear Up seminars that qualify for CFP credits. You can also do this for other seminars you want to check for CE eligibility.

Before the event, call the CFP Board of Standards at 1-800-487-1497 to find out what documents you will need for self-reporting these credits. We have included a “Timeline and Topics” attachment for this process with this document, and you will also need your completed GEAR UP Certification of Attendance” forms you completed at this seminar.

The day after the GEAR UP seminar ends, call the CFP Board of Standards at 1-800-487-1497 and they will walk you through the process for self-reporting these credits.



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