

Designation Descriptions

The Accredited in Business Valuation (ABV®) is a professional designation awarded to a CPA who specializes in calculating the value of businesses. The ABV certification is overseen by the American Institute of Certified Public Accountants (AICPA) and requires candidates to complete an application process, pass an exam, meet minimum Business Experience and Education requirements, and pay a credential fee.

The Accredited Investment Fiduciary® (AIF®) is sponsored by the Center for Fiduciary Studies and candidate criteria is based on a point threshold based on a combination of education, relevant work experience and professional development. Candidates must complete a capstone program and pass a certification exam. Continuing education requirements are six hours per year.

The American Institute of CPAs (AICPA) is the world's largest member association representing the accounting profession, with more than 431,000 members, and a history of serving the public interest since 1887. AICPA members represent many areas of practice, including business and industry, public practice, government, education and consulting.

The Certified Employee Benefit Specialist (CEBS®) is a professional designation earned by those who negotiate and oversee employee benefits packages.

The Certified Estate Planner Certification® (CEP®) requires a current license in finance, legal or tax, and eight hours of continuing education every two years.

The Certified Financial Planner™ (CFP®) certification is a voluntary certification, no federal or state law or regulation requires financial planners to hold CFP® certification. To obtain the certification, a candidate must have a bachelor's degree from an accredited university, or hold another approved designation, have three years of financial planning experience, and complete 30 hours of continuing education every two years.

A Certified Fund Specialist™ (CFS™) has received a certification from the Institute of Business and Finance (IBF) for their expertise in mutual funds and the mutual fund industry.

A certified public accountant (CPA) is a designation given by the American Institute of Certified Public Accountants (AICPA) to individuals that pass the Uniform CPA Examination and meet the education and experience requirements. The CPA designation helps enforce professional standards in the accounting industry.

The Certified Wealth Strategist® (CWS®) program incorporates three competencies required to be productive and effective as a wealth advisor: Creating business routines, applying client interaction and relationship skills, and obtaining competency in the technical wealth management issues faced by the High-Net-Worth market. Participants achieve significant levels of mastery and business growth by integrating financial advice competency with the ability to deliver expertise from multiple real-world perspectives.

The Chartered Alternative Investment Analyst (CAIA®) is issued by the Chartered Alternative Analyst Association. Candidates must have an undergraduate degree from an accredited university, four years industry experience and pass two levels of program studies requiring two hundred hours of study and continuing education every three years.

The Chartered Financial Analyst (CFA®) charter is a globally respected, graduate-level investment credential awarded by CFA Institute, the largest global association of investment professionals. To earn the CFA charter, candidates must possess a bachelor's degree from an accredited university, pass 3-six hour course exams which require 250 hours of study for each, have four years of professional work experience in an investment decision making process role, and abide by the Institutes Code of Ethics.

The Chartered Financial Consultant® (ChFC®) designation requires completion of a comprehensive educational program in financial planning, insurance planning, income taxation, retirement, estate planning, and investments, three years of full time business experience, and an undergraduate degree from an accredited university.

The Chartered Life Underwriter® (CLU®) is a professional designation for individuals who wish to specialize in life insurance and estate planning.

The Chartered Retirement Planning CounselorSM (CRPC®) is issued by the College of Financial Planning and requires a timed, online exam after a self-study course. Continuing education requirements are sixteen hours bi-annually.

The Certified Securities Compliance Professional (CSCP®) is a graduate-level program for experienced securities which is designed to meet the dynamic changes, and the increased responsibility and authority now carried by compliance professionals in the financial services industry. The certificate program provides a means for compliance professionals to demonstrate mastery of the two principal regulatory regimes (SEC and FINRA) that currently govern industry participants.

The Enrolled Agent (EA) designation is issued by the Internal Revenue Service(IRS) and requires a background check, passing of a written exam, and accepted IRS experience. Continuing education requirements of seventy-two hours over a three-year enrollment is required.

A Financial Paraplanner Qualified Professional (FPQP™) has a proven expertise in the arena of financial planning, which helps them better advise their clients.

The Juris Doctorate degree (JD) is the highest graduate-entry professional degree in law, which allows the holder to sit for a state bar exam in order to practice law. Once admitted to the bar, continuing education requirements apply.

A Master of Accountancy (MAcc) is a specific graduate level degree provided to students interested in going on to work in the field of accounting.

A Master of Business Administration (MBA) is a graduate degree that provides theoretical and practical training for business or investment management. An MBA is designed to help graduates gain a better understanding of general business management functions.

The Registered Life Planner® (RLP®) Designation is a training certification in studies of life planning and is sponsored by the Kinder Institute of Life planning.