



## CERTIFIED FINANCIAL PLANNER™

CFP credits are **only** attainable by those who hold the Certified Financial Planner (CFP®) credential through the CFP Board.

### IMPORTANT NOTES:

To earn CFP credit for eligible sessions, you must complete the following items no later than **EOD Monday, June 22, 2026\***:

- Log in to your account on <https://aicpaconferences.com/aicpa>
- Click “My Account” and select “All Conferences” and launch **AICPA ENGAGE 2026**

The screenshot shows the user interface for AICPA Engage 2026. At the top, there are navigation icons for 'My Account', 'Messages', 'Notifications', and 'Cart'. The 'My Account' menu is open, showing options like 'All Conferences', 'On-site conferences', 'Online conferences', 'Archives', 'CPE transcript', 'Favorites', 'Conference vault', 'Edit my info', 'Recently Viewed Sessions', 'Orders', 'Account Settings', and 'Logout'. The 'All Conferences' option is highlighted. Below the menu, there is a section for 'All Conferences' with a list of options: 'On-site conferences', 'Online conferences', 'Archives', and 'CPE transcript'. To the right, there is a section for 'AICPA & CIMA ENGAGE 2025' with a 'REVIEW EVENT' button. The event details include the date and time: 'June 8, 2025 3:45 PM - June 12, 2025 7:00 PM EDT'.

- Click the “Education” menu option and select “Evaluations and CPE Transcript”

The screenshot shows the user interface for AICPA Engage 2026. At the top, there is a navigation bar with 'Education', 'Agenda', and 'Support and Miscellaneous' options. The 'Education' menu is open, showing options like 'Handouts' and 'Evaluations and CPE Transcript'. The 'Evaluations and CPE Transcript' option is highlighted.



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- Complete individual session evaluations for all CFP eligible sessions
  - **IMPORTANT!** Do not skip this step! Completing the session evaluation confirms your attendance and eligibility to receive the associated CFP Credit

Wednesday

**ENG23K04 - AICPA & CIMA Professional Issues Update**  
12:20pm - 01:35pm EDT - June 7, 2023 | Room: Dolby Theater at Park MGM  
**Barry C. Melancon, CPA, CGMA**, Moderator; **Susan S. Coffey, CPA, CGMA**, Panelist; **Erik Asgeirsson**, Panelist; **Okorie L Ramsey**, Panelist  
Tags: PFP NAA EST TAX FIN CGMA EDG DEI FMA TCH PRA DCPA  
Total Minutes: 75

Take Evaluation

- Click the “Apply for CE Credits (CFP and EA)” button and provide your CFP Board ID Number where indicated.

Overall Evaluation and CPE Transcript  
Total CPE Credits: 0

AICPA & CIMA ENGAGE 2024

\* - Indicates answer is required.

**ADDITIONAL CONTINUING EDUCATION CREDITS:**

1 To claim credits towards your Certified Financial Planner (CFP) certification, please provide your CFP Board ID Number:

2 To claim credits towards your Enrolled Agent (EA) status through the IRS, please provide your PTIN:

**PLEASE PROVIDE ALL APPLICABLE INFORMATION BY MONDAY, JUNE 17. Due to guidelines set forth by the IRS and the CFP Board, no extensions can be granted.**

**For more information, please visit the Continuing Education (CE) tab under the Education menu.**

\* - Indicates answer is required.



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**FAQ's:**

**What is my CFP Board ID Number?**

For assistance with obtaining your CFP Board ID number, please contact the CFP Board at 202.379.2200 or [mail@cfpboard.org](mailto:mail@cfpboard.org).

**Why did a session not qualify for CFP credit?**

All sessions undergo a thorough review by the CFP Board to determine eligibility in advance of the conference. If a speaker has not provided key information like a description and/or learning objectives prior to the review, we are unable to offer CFP credit for the session. Additionally, CFP credit eligibility for any session is at the discretion of the CFP Board.

**When will my CFP Credits for AICPA & ENGAGE 2024 be reported?**

Due to reporting guidelines set forth by the CFP Board, all attendee credits must be submitted within 14 days after the conference concludes, or by **Thursday, June 25, 2026**. CFP® professionals with a matched record will immediately receive email notification that CE has been uploaded to their accounts.