



## 2026 AICPA ENGAGE Approved CFP Credits

Session Title	Session Date	CFP Program ID	CE Hours Offered
ENG2605. Responsibly Bullish: Goldman Sachs Economic and Market Perspectives (PFP, FIN)	Tuesday, June 9	348702	1.5
ENG2607. Opportunity Zone: What's the Opportunity (PFP, TAX)	Tuesday, June 9	348703	1
ENG2608. Tax Tea with Lemons and Erb (TAX, PRA, EST)	Tuesday, June 9	348704	1
ENG2613. Estate Planning for the 99% (TAX, EST, PFP)	Wednesday, June 10	348705	1.5
ENG2614. Qualified Small Business Stock / Section 1202: A "Simple" Rule with Complex Realities (EST, TAX)	Wednesday, June 10	348706	1.5
ENG2617. Advanced Income Taxation of Estates and Trusts (EST, TAX)	Wednesday, June 10	348707	1.5
ENG2621. When a Client Dies: Advising the Family on Tax and Financial Issues Involved in the Administration of the Estate (TAX, PFP)	Wednesday, June 10	348708	1.5
ENG2622. Estate Planning Post H.R. 1: Strategies for Every Client (PFP, EST)	Wednesday, June 10	348709	1.5
ENG2623. Beyond FIRE: Planning Your Career and Finances for the Greatest Flexibility (PFP, EDGE)	Wednesday, June 10	348710	1.5
ENG2633. Best Ideas Session: Navigating the Post-H.R. 1 Landscape — Tax-Planning Strategies for Your Clients (TAX, PFP, EST)	Thursday, June 11	348712	1.5
ENG26K05. ENGAGE KEYNOTE: AICPA Washington Update (All Tracks)	Thursday, June 11	348713	1
EST2601. Income and Wealth Transfer Tax Planning for Real Estate Investors	Tuesday, June 9	348714	1.5
EST2602. Strategic Document Review: Ensuring Compliance and Mitigating Risks	Tuesday, June 9	348715	1.5
EST2603. Estates and Trusts: S Corporation Shareholders	Tuesday, June 9	348716	1.5
EST2604. Estate Planning Update	Tuesday, June 9	348717	1
EST2606. Death, Taxes, and the Business Entity: Fiduciary Income Tax Traps When an Owner Dies	Tuesday, June 9	348718	1.5
EST2607. The QTIP Election — What You Need to Know	Tuesday, June 9	348719	1.5
EST2608. What The CPA Needs To Know About Foreign Trusts	Tuesday, June 9	348720	1
EST2609. Trust Me, It's Complicated: H.R. 1 and Trust Deductions	Tuesday, June 9	348721	1
EST2610. But I Thought My Trust Was Irrevocable	Wednesday, June 10	348722	1
EST2611. Business Succession Planning	Wednesday, June 10	348723	1
EST2612. Speed Round (IN-PERSON ONLY)	Wednesday, June 10	348724	1.5
EST2613. It's 10 pm, do you know if your trust is a GST Trust?	Wednesday, June 10	348725	1.5
EST2614. A View from the Front Lines – Current Issues in Estate and Gift Tax Audits and Litigation	Wednesday, June 10	348726	1.5
EST2615. But It's For Charity: Defending the Charitable Contribution	Wednesday, June 10	348727	1.5
EST2616. AICPA Trust, Estate, and Gift Tax Technical Resource Panel Update	Wednesday, June 10	348728	1
EST2617. Roth IRA Conversions	Wednesday, June 10	348729	1
EST2618. Navigating the Estate and Gift Tax IRS Labyrinth	Thursday, June 11	348730	1
PFP2601. Estate Planning for Divorce, S Corporation Shareholders, and the Vacation Home Shareholders, and the Vacation Home	Tuesday, June 9	348732	1.5
PFP2602. Intelligent Portfolios: How AI Enhances Research, Allocation, and Client Decisions	Tuesday, June 9	348733	1.5
PFP2603. DEBATE: How To Weather-Proof Your Portfolio For The Storms of Life	Tuesday, June 9	348734	1.5
PFP2604. Latest Thinking in Portfolio Construction for Goal-Oriented Investors	Tuesday, June 9	348735	1
PFP2605. Inside the Family Office: When to Take Control and Why It Matters	Tuesday, June 9	348736	1
PFP2606. Inside Today's Most Dangerous Scams: A CPA's Guide to Safeguarding Client Wealth	Tuesday, June 9	348737	1
PFP2607. AI vs. Advisor: Who Builds a Better Retirement Income Plan in 2026?	Tuesday, June 9	348738	1
PFP2608. Stuck in the Middle: Tools, Trends and Resources for the Sandwich Generation	Tuesday, June 9	348739	1
PFP2610. Beyond the Balance Sheet: Advanced Annuity and Life Insurance Strategies for CPAs	Wednesday, June 10	348740	1
PFP2612. Smart Retirement Decisions: Timing, Taxes and Benefit Optimization	Wednesday, June 10	348742	1.5
PFP2614. From Crypto Speculation to Digital Finance: A Competency Framework for CPAs & Planners	Wednesday, June 10	348744	1.5

Session Title	Session Date	CFP Program ID	CE Hours Offered
PFP2615. Strategic Tax Planning and Asset Protection Trusts, including Elder Care and Special Needs	Wednesday, June 10	348745	1.5
PFP2616. Your Clients Are Over-Insured: The role of healthcare financial literacy in wealth accumulation	Wednesday, June 10	348746	1
PFP2617. Self Directed IRAs	Wednesday, June 10	348747	1
PFP2618. Biggest Tax Planning Mistakes People Make In Retirement (And How to Avoid Them)	Wednesday, June 10	348748	1
PFP2619. Choosing the Right RIA Fee Model for Lifestyle or Enterprise Firms	Thursday, June 11	348749	1
PFP2620. From MVO to NWO: Two Approaches To Generating Retirement Income	Thursday, June 11	348750	1
PFP2621. Social Security and Medicare in 2026	Thursday, June 11	348751	1.5
PFP2622. AI-Proof Your Practice: Stop Advising, Start Coaching with Neuroscience	Thursday, June 11	348752	1.5
TAX2601. Individual Tax Update	Tuesday, June 9	348753	1.5
TAX2602. Multistate Tax Update	Tuesday, June 9	348754	1.5
TAX2603. The New Normal for Charitable Tax Planning	Tuesday, June 9	348755	1.5
TAX2604. International Changes	Tuesday, June 9	348756	1
TAX2605. Client Conversations: Translating Tax Law into Action	Tuesday, June 9	348757	1
TAX2606. R&D Credits and 174 - Where are we going?	Tuesday, June 9	348758	1
TAX2607. Entity Structure Essentials: Why Choice of Entity Matters for Tax, Liability & Growth in the Post-OBBA Era	Tuesday, June 9	348759	1.5
TAX2608. What's New in Tax Controversy?	Tuesday, June 9	348760	1.5
TAX2609. 529 Plans and Trump Accounts: Expanding the Playbook for the Next Generation	Tuesday, June 9	348761	1.5
TAX2610. Rich & Famous: Risk Control Strategies for Dealing with High Net-worth Clients	Tuesday, June 9	348762	1
TAX2611. Digital Assets - What's New?	Wednesday, June 10	348763	1
TAX2612. Beyond the WISP: Building a Living, Breach-Ready Cybersecurity Plan	Wednesday, June 10	348764	1
TAX2613. How To Align Your Bookkeeper and Tax Accountant for Financial Success	Wednesday, June 10	348765	1
TAX2614. Business Tax Update	Wednesday, June 10	348766	1.5
TAX2615. Pass-Through Entity Update	Wednesday, June 10	348767	1.5
TAX2616. Real Estate Exit Strategies	Wednesday, June 10	348768	1.5
TAX2617. Managing Equity Compensation: RSUs, ISOs, and ESPPs	Wednesday, June 10	348769	1.5
TAX2618. Sales Tax Minefield: How to Spot, Avoid, and Mitigate Hidden Client Risks	Wednesday, June 10	348770	1
TAX2619. The Digital Advisory Shift: Expanding Tax Services to Influencers and Content Creators	Wednesday, June 10	348771	1
TAX2621. H.R. 1 in Focus: Deadlines, Guidance, and Practical Insights	Thursday, June 11	348773	1.5