



A Broadridge Company

CONTINUING EDUCATION REQUEST FORM

To receive the appropriate credit you must check all that apply and turn it in at the end of the program.

ALL CE REQUESTS FOR THE FOLLOWING DESIGNATIONS WILL BE PROCESSED ON THE LAST BUSINESS DAY OF EVERY MONTH:

- CFP Board (CFP® Designation)
*Fi360 will electronically report your CFP CE credit only when you provide the following:
*CFP Certificate Number: _____
- IWI (CIMA®, CPWA®, CIMC® Designations)
*Fi360 will electronically report your IWI CE credit only when you provide the following:
*IWI ID Number: _____

ALL CE REQUESTS FOR THE FOLLOWING DESIGNATIONS/LICENSES WILL BE PROCESSED WITHIN 10 DAYS OF RECEIPT:

- NASBA (CPA Designation)
- Other: _____

ALL INFORMATION MUST BE COMPLETED IN ORDER TO BE PROCESSED (PLEASE PRINT LEGIBLY):

Name of Student: _____

Program Attended: _____ AIF _____ AIFA _____ PPC Passing Exam Score: _____%

Program Format: _____ Online _____ Capstone _____ Virtual Class

Address: _____

City/State/Zip: _____

Phone Number: _____

E-mail Address: _____

Signature: _____

Email to Fi360_professional.development@broadridge.com or fax to (412) 569.3441.