

## 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) \_\_\_\_\_

☐ **IAR** (CRD # exactly as on IAPD) \_\_\_\_\_

☐ **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](mailto:FI360_professional.development@broadridge.com) or fax to (412) 569.3441.