

CFP Board Ethics CE

New Standards for a Fiduciary World: Understanding CFP Board's Revisions

New Standards for a Fiduciary World continues the engaging presentations that audiences expect from Candura Group. We use polls, videos and case studies to keep everyone involved and learning. Attendees participate in an informative and engaging session that teaches the learning objectives required by CFP Board for ethics training.

1. Identify the structure and content of the revised Code and Standards, including significant changes and how the changes affect CFP® professionals.
2. Act in accordance with CFP Board's fiduciary duty.
3. Apply the Practice Standards when providing Financial Planning.
4. Recognize situations when specific information must be provided to a client.
5. Recognize and avoid, or fully disclose and manage Material Conflicts of Interest.

This course delivers a comprehensive, in-depth review of the updates to CFP Board's *Standards of Professional Conduct* effective October 1, 2019.

Presented by Dan Candura, CFP®

During the presentation attendees will be encouraged to use a cell phone, tablet, or other web-based device to participate and interact with fellow participants.



Ethics training that exceeds expectations.