# *Knowledge* Hub+

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THE AMERICAN COLLEGE OF FINANCIAL SERVICES®

# Your All-In-One Access to an Expansive Knowledge Network

Explore the topics and experts delivering the insights you need to ***know now*** in advanced planning, retirement planning, tax planning, philanthropic planning, wealth management, practice management, and more — all accessible in **Knowledge Hub+**.

## Advanced Planning

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Advanced Considerations when Navigating Crypto in Financial Planning | Tyrone V. Ross, Jr. | 1.0 | 1.0 |
| Five Unique Planning Considerations for Aging Parents of Disabled Children | Joellen Meckley, JD, MHS, ChSNC® | 1.0 | 1.0 |
| New Horizons in Estate Planning | Stephen Parrish, JD, RICP®, CLU®, ChFC®, AEP® | 1.0 | 1.0 |
| When Life Throws a Curveball: Planning Essentials for Clients Impacted by Disability | Joellen Meckley, JD, MHS, ChSNC® | 1.0 | 1.0 |
| Convert More Prospects with a Simplified Scalable Approach | Jason L. Smith, CEP®, BPC | 1.0 | 1.0 |
| Buying U.S. Property for U.S. Non-Citizens | Chia-Li Chien, PhD, CFP®, PMP®, CPBC | 1.0 | 1.0 |
| Roth Conversions Prior to Sunset | Robert S. Keebler, CPA/PFS, MST, AEP | 1.0 | 1.0 |

## Ethics in Financial Planning

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| AI Ethics in Financial Services: Ethical Considerations of ChatGPT | Azish Filabi, JD, MA, Eric Ludwig, PhD, CFP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF® | 1.0* | 1.0 |
| Trust in Financial Services | Azish Filabi, JD, MA, Domarina Oshana, PhD, Katherina G. Pattit, PhD, and Jason M. Pattit, PhD | 1.0 | 1.0 |
| Navigating Ethics and Regulation of AI | Azish Filabi, JD, MA | 1.0* | 1.0 |

*This course meets The College's Professional Recertification Program (PRP) ethics CE requirement.

## Financial Planning

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Financial Advice 3.0: The Past, Present, and Future of the Profession | Adam Holt, CFP®, ChFC® | 1.0 | 1.0 |
| Frameworks for Financial Diagnosis: A Deep Dive into Effective Conversations | Adam Holt, CFP®, ChFC® | 1.0 | 1.0 |
| How You Deliver Advice Matters: New Levels of Engagement to Satisfy the Experience Economy | Adam Holt, CFP®, ChFC® | 1.0 | 1.0 |
| Crypto Assets in Financial Planning: A Fiduciary Approach | Tyrone V. Ross, Jr. | 1.0 | 1.0 |
| Improving Client Relationships and Outcomes through the Inclusive Financial Wellbeing and Empowerment Model | Timi Joy Jorgenson, PhD | 1.0 | 1.0 |
| AI, Prompt Engineering and Financial Planning | Eric Ludwig, PhD, CFP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF® | 1.0 | 1.0 |
| The Financial Burdens of the Opioid Epidemic | Cheryl Canzanella, CLU®, ChSNC®, LUTCF | 1.0 | 1.0 |
| Navigating the TCJA Sunset Provisions | Ben Birken, CFP®, Mike Lecours, CFP®, and Chris Granger, CFP® | 1.0 | 1.0 |
| Cognitive Decline Among Aging Clients - A Guide for Financial Advisors | | 4.0 | 4.0 |
| The Hidden Code of End-of-Life Decisions | Michael Finke, PHD, CFP® | 1.5 | 1.5 |

## Insurance & Risk Management

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Life Insurance and Changing Demographics for Women | Sophia Duffy, JD, CPA | 1.0 | 1.0 |
| The Value of Permanent Life Insurance in Wealth Management | Michael Finke, PHD, CFP® and Ragiv Rebello | 1.0 | 1.0 |
| Life Insurance and Annuities in a Changed Planning Environment | Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP® | 1.0 | 1.0 |
| Key Person and Corporate Owned Life Insurance Planning | Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP® | 1.0 | 1.0 |
| From Policy to Practice: LTC Insurance Trends and Planning Strategies When Benefits Are Used | Kaylee Ranck, PhD, Joellen Meckley, JD, MHS, ChSNC®, and James Karthaus, MA, CFP®, CLU®, ChFC® | 1.0 | 1.0 |
| Fiduciary Insights, Mitigating Risks: GUL vs. VUL | James Karthaus, CFP®, CLU®, ChFC®, MA | 2.0 | 2.0 |

## Philanthropic Planning

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Connecting With Donors | Jennifer Lehman, PhD, JD, CFP®, CAP® | 1.0 | 1.0 |
| Planned Giving: Fun with Taxes and Probate | Jennifer Lehman, PhD, JD, CFP®, CAP® | 1.0 | 1.0 |
| Where Philanthropy Fits in Legacy Planning for Families of Significant Wealth | Phil Cubeta, CLU®, CHFC®, MSFS, AEP®, CAP® | 1.0 | 1.0 |
| DAF Grants May Be Denied: Are You Ready to Respond? | Phil Cubeta, CLU®, CHFC®, MSFS, AEP®, CAP® | 1.5 | 1.5 |

## Practice Management

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Revolutionizing Financial Planning with ChatGPT: A Collaborative Approach between Technology and Human Expertise | Eric Ludwig, PhD, CFP® and Chet R. Bennetts, CFP®, ChFC®, CLU®, RICP®, CLF® | 1.0 | 1.0 |
| Foundations of Digital Marketing for Financial Advisors | Intention.ly | 1.0 | N/A |
| Content Creation and Outreach | Intention.ly | 1.0 | N/A |
| Client Engagement and Retention | Intention.ly | 0.9 | N/A |
| Advanced Digital Marketing Strategies | Intention.ly | 0.8 | N/A |
| How to Communicate with Impact and Influence | Deirdre Van Nest | 1.0 | N/A |
| Are You Capitalizing on the SEC Marketing Rule? | Matt Seitz | 1.0 | 1.0 |

## Retirement Planning

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Drive Growth and Deeper Client Relationships with the Retirement Income Style Awareness | Wade Pfau, PhD, CFA, RICP® and Alex Murguia, PhD | 2.0 | 2.0 |
| SECURE Act's Definitive Distribution Roadmap for Inherited IRAs | Denise Appleby | 1.0 | 1.0 |
| Creating Tax-Efficiency for Retirement Income | Wade Pfau, PhD, CFA, RICP® | 1.0 | 1.0 |
| A Goals-Based Approach to Retirement Income Planning | Michael Finke, PHD, CFP® | 1.0 | 1.0 |
| Estimating the True Cost of Retirement | David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP® | 1.0 | 1.0 |
| Redefining the Optimal Retirement Income Strategy | David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP® | 1.0 | 1.0 |
| Snowbirding: Living in More Than One Location in Retirement | Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP® | 1.0 | 1.0 |
| Social Security Compared to Annuities - Income Streams | Michael Finke, PHD, CFP® | 1.0 | 1.0 |
| Social Security Considerations in Estate Planning | Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP® | 1.0 | 1.0 |
| The Retirement Planning Issue No One Wants to Discuss: Diminished Decision-Making Capacity | Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP® | 1.0 | 1.0 |
| What The Secure Act 2.0 Means in Practice | Stephen Parrish, JD, RICP®, CLU®, CHFC®, AEP® | 1.0 | 1.0 |
| Maximizing Retirement Success: Beyond Assets and Liabilities | Chia-Li Chien, PhD, CFP®, PMP®, CPBC | 1.0 | 1.0 |
| Social Security: Dispelling Common Myths with Essential Truths | Heather Schreiber, RICP®, NSSA® | 2.0 | 2.0 |
| The Retirement Income Landscape Today (Episode 1) | Eric Ludwig, PhD, CFP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP® | 1.0 | 1.0 |
| Redefining Optimal: Aligning Retirement Strategies with Your Life's Why (Episode 2) | Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP®, and David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP® | 1.0 | 1.0 |
| Retiring is a Change Management Issue (Episode 3) | Eric Ludwig, PhD, CFP® and Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP® | 1.0 | 1.0 |
| Unlocking Retirement Success: Five Crucial Conversations Advisors are Currently Having About Reverse Mortgages | Don Graves, RICP®, CLTC®,CSA® | 1.0 | 1.0 |
| Adaptive Approaches to Retirement Income (Episode 4) | Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP, and Christine Benz | 1.0 | 1.0 |
| Mastering Market Volatility, Longevity, and Tax Optimization with Reverse Mortgages | Don Graves, RICP®, CLTC®,CSA® and Wade D. Pfau, PhD, CFA, RICP® | 1.0 | 1.0 |
| How to Understand, Communicate, and Plan for Risk in Retirement | Justin Fitzpatrick, PhD, CFA, CFP® | 1.0 | 1.0 |
| Beating Biases in Retirement Planning (Episode 5) | Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP® | 1.0 | 1.0 |
| The Future Self and Better Retirement Decisions (Episode 6) | Eric Ludwig, PhD, CFP®, Jamie Hopkins Esq., LLM, CFP®, ChFC®, CLU®, RICP® | 1.0 | 1.0 |
| How Secure is Your Retirement? | Sophia Duffy, JD, CPA, AEP and Stephen Parrish, JD, RICP®,AEP® | 1.0 | 1.0 |
| Behavioral Finance and Retirement Planning | Michael Finke, PhD, CFP® and David Blanchett, PhD, CFP® | 2.0 | 2.0 |
| Retirement Planning in a Turbulent Market | Michael Finke, PhD, CFP®, Wade Pfau, PhD, and David Blanchett, PhD, CFP® | 2.0 | 2.0 |

## Tax Planning

| Title | Presenter(s) | The American College CE | CFP Board CE |
|---|---|---|---|
| Quantifying the Impact of Tax Planning | Michael Finke, PhD, CFP® | 1.0 | 1.0 |
| Principles of Tax Planning for Financial Advisors | Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA | 1.0 | 1.0 |
| Planning with Net Unrealized Appreciation | Jeffrey Levine, CFP®, CPA, PFS, CWS, AIF®, RICP®, ChFC®, BFA™, MSA | 1.0 | 1.0 |
| Planning Strategies to Mitigate the Impact of the 10-Year Rule | Jeffrey Levine, CPA/PFS, CFP®, ChFC®, RICP®, CWS®, BFA®, MSA | 1.0 | 1.0 |
| Small Business Strategies for Navigating the QBI Deduction and Real Estate Ownership | Sophia Duffy, JD, CPA | 1.0 | 1.0 |

## Wealth Management

| **Title** | **Presenter(s)** | **The American College CE** | **CFP Board CE** |
|---|---|---|---|
| It's Good to Have Options: Introducing RILAs | David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP® | 1.0 | 1.0 |
| Navigating the Crypto Landscape to Set the Stage for Financial Planning | Tyrone V. Ross, Jr. | 1.0 | 1.0 |
| No Portfolio is an Island | David Blanchett, PHD, MSFS, CFA, CLU®, CHFC®, CFP® | 1.0 | 1.0 |
| Leading with Proactive Advice during "Moments That Matter" | Philipp Hecker | 1.0 | 1.0 |
| Investing in Behavioral Markets | Michael Finke, PhD, CFP® | 2.0 | 2.0 |
| Aligning Investment Portfolios with Client Values | Andrew Tudor, CFP®, RICP®, CAP® | 1.0 | 1.0 |