Financial Experts Network UPDATE & Plans

January 20, 2026

119 Live webinars in 2025

95+ Subject
Matter Experts

Financial Experts Network (FEN)

All webinars are rated by listeners

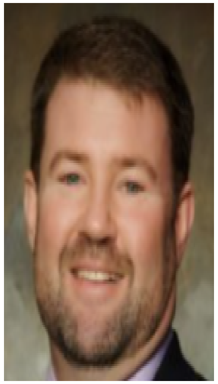
88% **rate webinars as excellent**

CFP Continuing Education

~900 CFPs Subscribers

- >90% of LIVE webinars are eligible for CFP CE credits
- The required 2 Ethics CE credits is available LIVE
- FEN submits credit weekly to CFP Board and FINRA

Upcoming Webinars



Code of Ethics and Standards of Conduct:

Mandatory Ethics CE for CFPs and IARs

Monday, March 16, 2026 at 12:00 PM ET

Presented by Tom Duffy, CFP™, MBA, Jersey Shore Financial Advisors, LLC

CE Eligible

CFP, CLU, ChFC, RICP, IAR

More CE and CPE

550 IARs: LIVE Programs on Regular Basis

NEW IAR programs with Masterclass and MOST Months

~55 Self-Study Programs (CFP and IAR CE-eligible)

CPE credits to CPAs AND **Enrolled Agents**

Approved for **CDFA CE**

NAPFA and American College ACCEPT our programs:

Re:CFP Approved CE

Financial Experts Dashboard

Welcome
Tom Dickson

FAVORITES +

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LEARNING

MY CE

MY MASTERCLASS

CE SELF STUDY COURSES

Total CE Credits since you Joined: 15

CE CREDIT TYPE: - Any -
PROGRAM TYPE: - Any -
DATE: - Any -

Apply Filters

DOWNLOAD MY CE CREDIT REPORT

Webinar Title	Date	CE Credit Type
Ethics CE: CFP Board's Revised Code of Standards (2 IAR Ethics CE Credits) - 08.29.2025 Type: Webinar DOWNLOAD CERTIFICATE	08/29/2025	CFP, CLU, ChFC, CPA, RICP, IAR **IAR CE Ethics** **# CE Credits: 2**
Ethics and Fiduciary Duties in Investment Advisory (Approved for 2 IAR CE) Type: Webinar No Certificate	09/26/2024	CFP, CLU, ChFC, RICP, IAR **IAR CE Ethics** **# CE Credits: 2**

Attendance Certificates for NAPFA, American College

Certificate of Completion

Presented to

Diane Pearson

Online
has successfully completed

END OF LIFE FINANCIAL PLANNING GUIDE

FIELD(S) OF STUDY: Specified Knowledge
February 1st, 2024
Group Internet Based

CE/CPE CREDIT EARNED: 1 CE/CPE Credit

In accordance with the standards of the National Registry of the CPE Sponsors, Inc and the Certified Financial Planner Board of Standards, CE/CPE credits have been granted based on a 50 minute hour.

FINANCIAL EXPERTS NETWORK

15 Allegheny Avenue, Oakmont, PA 15139
National Registry Sponsor Number 145173
Phone: (412) 580-5954
CFP Sponsor ID 6661, Program 322018

Tom Dickson

Referral Program:
1 Month Free for EVERY New Subscriber

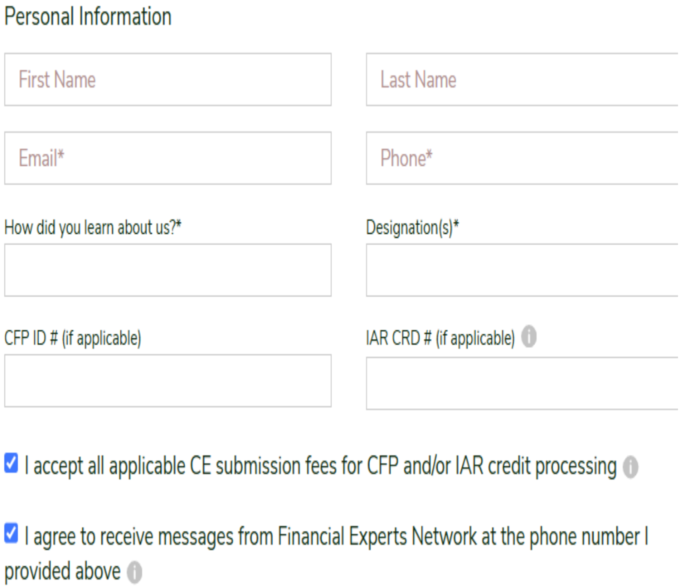
Monthly Plan Subscribers

$15 or $19 Credit

Annual Plan

will be Prorated

$13.33 or $15.83


Personal Information

First Name | Last Name

Email* | Phone*

How did you learn about us?*

Designation(s)*

CFP ID # (if applicable)

IAR CRD # (if applicable)

☑ I accept all applicable CE submission fees for CFP and/or IAR credit processing

☑ I agree to receive messages from Financial Experts Network at the phone number I provided above

Subscription Plans + Reporting Fees

Pro Plan

$19 Month for 6+ Months
$199 Annual

CFP CE

Reporting Fees

Live: $2 per hour

Self-Study: $3-5 per hour

IAR (FINRA) CE
Reporting Fees

Live and Self-Study:

$5 per hour

2026 Plans

Podcasts

Highly Rated and Attended Webinars

Weekly Podcast is Goal

On Website + Other Channels?

Would you prefer summary or full presentation?

A. Summary of Highlights: 8 to 15 minutes

B. Full Presentation: 45-55 minutes

2026 Plans

More Masterclasses: Estate Planning and Other Topics?

More Simulated Live: Popular, Highly Rated Programs

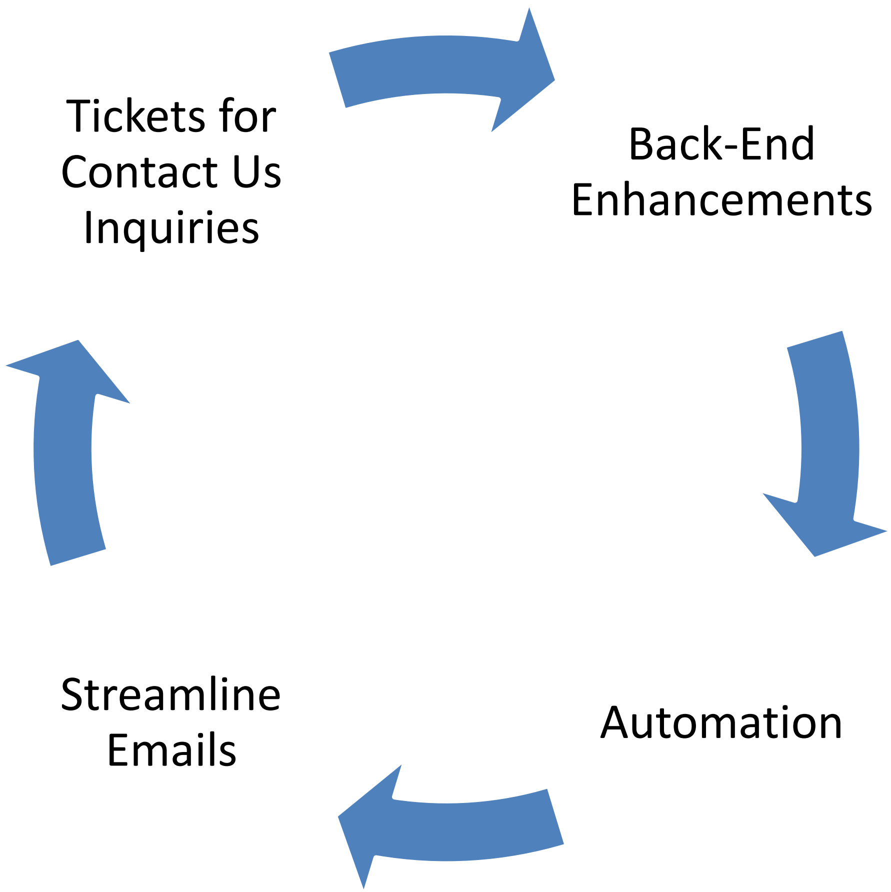
New Format for Presentations: Primer on topic + Case Studies

Community Calls for Best Practices and/or Q&A with Experts

Alliances

- M&A with AdvisorLaw
- Rethinking65 for Select Sponsored Webinars
- Possibly Life Insurance?

2026 Plans


Tickets for Contact Us Inquiries
Back-End Enhancements
Automation
Streamline Emails

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My CE is where you can find the CE credits you've earned with Financial Experts.

Tips:

1. Credits post next day, not immediately.
2. You can sort by CE Credit Type, program type (live webinar vs. self-study) and date
3. You can download a report of your CE Credits.
4. Attendance Certificates can be downloaded.

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My Masterclass is where you can find join webinar links, registration links, replays, presenter materials and quizzes for any Masterclass you signed up for.

What You Will Find:

1. Your unique link to join a session
2. You can register for a session.
3. Replays for all sessions.
4. Presenter materials

College Planning Strategies in 2025: A Masterclass for Guiding Affluent Families

Beth Walker

College Planning Guru | Senior Wealth Strategist

Center for College Solutions | Carson Wealth

- Session 1 Of CP MC: Foundations Of College Planning For High-Income Clients View Replay Self-study Quiz
- Session 2 Of CP MC: Mastering The FAFSA, CSS Profile & The Financial Aid Illusion View Replay Self-study Quiz
- Session 3 Of CP MC: What Every Advisor Should Know About Evaluating 529 Plans View Replay
- Session 4 Of CP MC: Purpose-Driven Planning & Academic Positioning View Replay
- Session 5 Of CP MC: Dynasty 529 Planning: Multigenerational Education Funding And Estate Strategy Register

Tax Planning after OBBBA: A Masterclass with Bob Keebler

Bob Keebler, CPA/PFS, MST, AEP (Distinguished), CGMA

Partner

Keebler & Associates

- Session 1 Of Tax Planning Masterclass: Tax Bracket Management View Replay Self-study Quiz
- Session 1 Of Tax Planning Masterclass: Tax Bracket Management View Replay Self-study Quiz
- Session 2 Of Tax Planning Masterclass: Foundational To Advanced Strategies For Individual Clients View Replay Self-study Quiz

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UPCOMING WEBINARS

CE Self Study Courses is where you will find all CE-eligible replays with mandatory quiz.

What You Will Find:

1. You can search by CE Credit Type. For example, CFP eligible courses or IAR Ethics.
2. You can search by speaker name or tile of the program.

CE-Eligible Self-study

Please sort based on type of credits you would like to earn. Be sure to watch video in it's entirety, review handouts and take the quiz listed under the program by clicking the "Take Quiz" button.

NASAA does not endorse any particular provider of CE courses. The content of the course and any views expressed are our own and do not necessarily reflect the views of NASAA or any of its member jurisdictions.

CREDIT TYPE

- [ ] CFP® CE
- [ ] CLU®, ChFC®, RICP® CE
- [ ] IAR CE Products and Practices
- [ ] IAR CE Ethics

Search For CFP And/Or IAR CE-Eligible Programs

Search by title

Displaying 9 of 62 Clear Filters

Ethics and Regulations

Mastering the SEC Marketing Rule: What Every Investment Adviser Rep Needs to Know in 2025

Speaker Name: Michelle Atlas Quinn

Listener Ratings: 90% **Listener Comments**

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UPCOMING WEBINARS

PAST WEBINARS

Upcoming Webinars lists all PUBLISHED live and "simulated" live webinars.

What You Will Find:

1. The list of Recommended webinars is based on your Profile; e.g. You will see CFP eligible courses if you have CFP checked in your profile.
2. You can personalize your list, based on CE type and topic.
3. Registered will show you those webinars which you've registered for.
4. If you've already attended a webinar, you will see a notice.
5. You can register by clicking on the box next to a webinar. Be sure to scroll to the bottom of the page and click on "Register All Selected."

All | Recommended | Registered | IAR CE | CFP CE

We've personalized your webinar list based on your profile. You can personalize your preference by using the sorts below.

CE CREDIT TYPE: - Any -

TOPIC: College Planning

PERSONALIZE

Ethics CE: CFP Board's Revised Code of Standards (2 IAR Ethics CE Credits) -10.31.2025

Fri, Oct, 31 2025 09:00 AM ET

Tom Duffy

CE Credits:

CFP, CLU, ChFC, CPA, RICP, IAR

You've already Attended(CFP)
You've already Attended(IAR)

REGISTER

Learn More

When It Might Be a Complaint: What Every IAR Needs to Know (2 IAR Ethics CE) - 10.31.2025

Fri, Oct, 31 2025 11:30 AM ET

Michelle Atlas-Quinn, J.D., AdvisorLaw

CE Credits:

Approved for CE Credit in Year: **2025**

CFP, CLU, ChFC, CPA, RICP, IAR

REGISTER

Learn More

Equity Compensation and Stock Options

4-Session Advanced Training

2 CE Credits per Session

CFP®, IAR (NASAA), CPA, EA Eligible

Why Equity Compensation Matters

Equity awards are a major driver of client wealth

- Tax complexity creates planning opportunities and risk
- Advisors with equity expertise deliver higher client value

Masterclass for Advanced Training

- Covers public and private company equity awards
- Focus on taxation, strategy, and advisory application
- Planning strategies and common pitfalls
- How life and job events affect equity compensation

Masterclass Schedule

Session #1: Introduction/Restricted Shares/RSUs/ESPPs
Tuesday, Feb. 3, 2026 | 3:00-5:30 PM ET (including Q&A)

Session #2: NQSOs and ISOs
Tuesday, Feb. 10, 2026 | 3:00-5:30 PM ET (including Q&A)

Session #3: Grant/Exercise Considerations/Tax Reporting/Termination Events
Tuesday, Feb. 17, 2026 | 3:00-5:30 PM ET (including Q&A)

Session #4: Private Company Issues/Other Equity Awards/Concentrated Stock/NUA
Tuesday, Feb. 24, 2026 | 3:00-5:30 PM ET (including Q&A)

Sign Up:

FINANCIAL EXPERTS NETWORK

www.financialexpertsnetwork.com

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Masterclasses

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Guest Expert:

Aric Jacobson

READ BIO →

Equity Compensation and Stock Options

4-Session Advanced Training • 2 CE Credits per Session

Approved/Eligible for: CFP®, IAR (NASAA), CPA, and EA continuing education

The Equity Compensation Masterclass consists of four sessions covering a broad overview of the topic with a focus on planning opportunities for financial advisors. There will be an in-depth analysis of the various types of equity awards that are typically issued to clients with an emphasis on taxation issues and strategies that might be considered. These sessions should help advisors gain a deeper understanding of this area and allow them to add more value for their clients.

Session 1 will provide an introduction to the course with a summary of the general concepts that will be covered throughout the course. We will discuss generally the types of awards from both public and private companies along with an overview of the various considerations that arise. We will also talk about information gathering and the documents that are critical when guiding clients regarding their equity awards. Session 1 will also look more specifically at Restricted Stock Awards, Restricted Stock Units and Performance Shares, focusing on the key

Costs and Details

Subscribers:

$0 for Program

- Access to Live and Replays
- Materials, Summaries & CE

$2 to $5 for CE Report Fee

- CFP, IAR, CPE, EA
- NAPFA, American College

Non-Subscribers:

$59 for Program

- Access to Live and Replays
- Materials, Summaries & CE

$2 to $5 for CE Report Fee

- CFP, IAR, CPE, EA
- NAPFA, American College

Non-Subscriber Sign UP

Session 1: Foundations

Overview of equity awards and planning ideas

- Key documents and information gathering
- Restricted stock, RSUs, performance shares, and ESPPs

Session 2: Stock Options

Comparing stock options to restricted stock

- Key features of ISOs and NQSOs
- Taxation of incentive and nonqualified stock options

Session 3: Strategy & Events

Grant and exercise strategies

- Tax reporting considerations
- Termination, retirement, and change of control impacts

Session 4: Private Companies

Liquidity and valuation challenges

- 83(b) elections and QSBS considerations
- SARs, phantom stock, profits interests
- Concentrated positions
- NUA

Who Should Attend

Advisors and Tax Pros serving executives and high-income clients

- You work with clients who have employer equity awards
- Advisors and Tax Pros seeking advanced tax and compensation knowledge

Questions?

Tom Dickson

Email: tom@financialexpertsnetwork.com

Cell: (412) 580-5954