

## Mapping of The Institute’s CE Categories to MFDA CE Categories

This document provides guidance on how CE activities accredited by The Institute for Advanced Financial Education (“The Institute”) **on or after December 1, 2021** are to be used under the MFDA CE Program.

Credits are to be assigned on a 1:1 basis. For example, a CE activity given 2.5 Practice Competencies credits under The Institute CE approval program would be worth 2.5 Professional Development Credits under the MFDA CE Program.

Providers will have the ability to request that The Institute undertake additional accreditation in order to provide a CE approval certificate/letter that shows details of the MFDA Categories.

- If Providers obtain this certificate with details of the MFDA categories, they do not need to use the mapping below, but can instead rely upon the certificate provided by The Institute.
- If Providers obtain a certificate without details of the MFDA categories, they need to use the mapping below.

<b>THE INSTITUTE CE CATEGORY</b>	<b>MFDA CE CATEGORY</b>
Practice Competencies	Professional Development
Practice Attributes	Business Conduct <sup>1</sup>

1. If a Provider would like to post a CE activity as Business Conduct, they will need to provide confirmation from The Institute whether it is “Business Conduct - Ethics” or “Business Conduct - Other”.

All questions regarding The Institute’s accreditation and the related CE program should be addressed to The Institute first.