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- ADPA® - Accredited Domestic Partnership AdvisorSM
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- CRPS® - Chartered Retirement Plans SpecialistSM

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- APMA® - Accredited Portfolio Management AdvisorSM
- AWMA® - Accredited Wealth Management AdvisorSM
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- Master of Science in Personal Financial Planning

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- Financial Risk Manager (FRM®)
- Insurance Licensing
- Securities Licensing

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- Ethics CE for CFP® Certification
- Insurance CE
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