

Maintaining the CeFT® Designation

Requirements:

- ✓ Attend the Mid-Year Workshop *or* the Annual Conference once every two years.
- ✓ Sign, return, and adhering to the SMI Advisor Agreement, which includes the Code of Ethics.
- ✓ Remain in good standing with SMI.
- ✓ Remain in good standing with the governing board of your primary designation (CFP®, CIMA®, CFA®, etc...).
- ✓ Complete 15 hours of Continuing Education Credit per year, with at least 10 credits from SMI.
- ✓ Select a level of membership, on an annual basis (CeFT® Maintenance, Continuous Studies, Mastery)*.

For those not taking the certification exam, Basic Maintenance is also available, beginning the month after the Core contract has ended, in addition to Continuous Studies and Mastery.