2026 Advisor Symposium

State approval status in credit hours for 2026 Advisor Symposium

State	CLE for Attorneys	CPE for Accountants (NASBA)[1]	CPE for IRS Enrolled Agents, Other Tax Return Preparers[2]	CFP for Financial Professionals[3]	Professional Recertification Program credits for American College designations[4]
Alabama	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Alaska	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Arizona	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Arkansas	2.5 General Tele/Sat Digital Download Webcast	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
California	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Colorado	3.0 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Connecticut	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Delaware	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
District of Columbia	*Non-mandatory CLE state.*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Florida	3.0 General 3.0 Tax Law	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Georgia	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Hawaii	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Idaho	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Illinois	2.5 General Live - Technology	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Indiana	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Iowa	2.5 General Live webcast	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Kansas	3.0 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Kentucky	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Louisiana	2.42 General Groupcast	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Maine	2.5 General Live Webcast	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General

Updated as of 9/18/2026

State approval status in credit hours for 2026 Advisor Symposium

State	CLE for Attorneys	CPE for Accountants (NASBA)[1]	CPE for IRS Enrolled Agents, Other Tax Return Preparers[2]	CFP for Financial Professionals[3]	Professional Recertification Program credits for American College designations[4]
Maryland	*Non-mandatory CLE state.*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Massachusetts	*Non-mandatory CLE state.*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Michigan	*Non-mandatory CLE state.*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Minnesota	2.5 General In person	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Mississippi	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Missouri	3.2 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Montana	2.5 General Live Interactive Web Program	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Nebraska	2.5 General Distance learning	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Nevada	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
New Hampshire	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
New Jersey	3.1 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
New Mexico	2.5 General; Video replay w/monitor (live credits)	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
New York	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
North Carolina	2.5 General Live (Webcast)	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
North Dakota	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Ohio	2.5 General; Videotape w/discussion leader	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Oklahoma	3.0 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Oregon	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Pennsylvania	2.5 Substantive Alternate Delivery	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Rhode Island	3.0 General In person	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
South Carolina	2.42 General, Estate & Probate, & Tax Online	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
South Dakota	*Non-mandatory CLE state.*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General

Updated as of 9/18/2026

State approval status in credit hours for 2026 Advisor Symposium

State	CLE for Attorneys	CPE for Accountants (NASBA)[1]	CPE for IRS Enrolled Agents, Other Tax Return Preparers[2]	CFP for Financial Professionals[3]	Professional Recertification Program credits for American College designations[4]
Tennessee	*Pending*	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Texas	2.5 General Live presentation	3.0 Tax	3.0 hours	3.0 Tax Planning	3.0 General
Utah	2.5 General Elective/Self-study	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Vermont	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Virginia	2.5 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Washington	2.5 Law & Legal Remote / Virtual	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
West Virginia	2.5 General Live Attendance	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Wisconsin	3.0 General	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General
Wyoming	2.5 General Live video	3.0 Taxes	3.0 hours	3.0 Tax Planning	3.0 General

1 New York Life is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

2 Credit approved for Federal Tax Law Topics/Fed Tax Related categories.

3 Credit approved for Tax Planning.

4 Participants who want to maintain PRP credits for American College designations should provide their participation certificate for other types of continuing education to the College. Credit awarded will be equal to the amount of the credit received by the participant in his or her professional category, which will vary by state and by type of credit sought. Course credits reflect those approved by CFP board. If no other professional CE is requested by or awarded to the participant, he or she will be provided with a Professional Development certificate from Saenger Consulting for 3.0 hours of credit for American College designations.

Updated as of 9/18/2026