

## 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 (i.e., CFP®, CIMA®, CFA®, or CPA®).
- ✓ Complete 15 hours of Continuing Education Credit per year, with at least 10 credits from SMI (see here for more on [Continuing Education Requirements](#)).
- ✓ Select a level of membership, on an annual basis (see below).

