

2018 Schools Schedule & Registration



CANNON
FINANCIAL INSTITUTE



Why Cannon?

Our clients and students are looking for ways to advance their careers, help their businesses succeed and the families they serve thrive. We give our clients control of their path, helping turn understanding into knowledge and knowledge into wisdom. We instruct and work on the leading edge because society always benefits from the service of well-prepared financial professionals.

Our offerings include industry-forward instruction in personal trust, corporate trust, sales, relationship and practice management, retirement planning, operations, risk management, audit and compliance and investment management. Delivered to you at one of our schools across the country or wherever you may be; via live classroom or virtual classroom.

Learn with us. Grow your knowledge. Serve the world.

Accreditation & Certifications

Professional certifications and a commitment to continuing education are crucial to maintaining professional standards and limiting liability. The professional certifications which can be attained through our career programs have been recognized throughout the financial services community as representing the pinnacle of professional accomplishment.

Obtain the following certifications by attending Cannon schools:

- AFIM™ Accredited Fiduciary Investment Manager
- CCTS™ Certified Corporate Trust Specialist
- CFIRS™ Certified Fiduciary and Investment Risk Specialist
- CISP™ Certified IRA Services Professional
- CRSP™ Certified Retirement Services Professional
- CSOP™ Certified Securities Operations Professional
- CTFA™ Certified Trust and Financial Advisor
- CWS® Certified Wealth Strategist®

Continuing Education

Cannon Schools qualify for continuing education credits with many certification and licensing boards. Since credit hours, filing procedures, and filing deadlines vary by discipline, and sometimes from state to state, if you wish to use a Cannon School for continuing education credit, please contact our **Continuing Education Department** at 706-389-7645 and we will be glad to assist you.

Cannon Schools may qualify for continuing education credits for the following professionals:


- | | | | |
|-------|--------|-------|-------|
| CCTS™ | CISP™ | CRSP™ | CSOP™ |
| CTFA™ | CFSA™ | AFIM™ | CFP® |
| CFS™ | FIRMA™ | | |
- CPA™ Certified Public Accountant
 FINRA Series 6, 7, 63 (Firm Element)
 Enrolled Agents (IRS)
 Attorneys




Cannon Financial Institute 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 addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North Suite 700, Nashville, TN, 37219-2417. Or by visiting the website: www.nasba.org.

ENROLLED AGENTS

Cannon is designated as a qualified education sponsor by the IRS and can offer continuing education credit to Enrolled Agents. Cannon's agreement with the IRS' Office of Professional Responsibility is that Cannon will meet the requirements of 31 Code of Federal Regulations, Section 10.6(g), covering maintenance of attendance records, retention of program outlines, qualifications of instructors, and length of class hours. This agreement does not constitute an endorsement by the IRS as to the quality of the programs or their contribution to the professional competence of the enrolled individual.

CFP®, CERTIFIED FINANCIAL PLANNER™ and  are certification marks owned by the Certified Financial Planner Board of Standards, Inc. These marks are awarded to individuals who successfully complete the CFP Board's initial and ongoing certification requirements.

INSTITUTE OF CERTIFIED BANKERS™

Cannon Financial Institute is an Accredited Continuing Education Provider (ACEP) of the Institute of Certified Bankers™ (ICB). The ICB is dedicated to promoting the highest standards of performance and ethics within the financial services industry. 

For tuition rates or more information, please contact a Cannon Client Advisor at 706-353-3346 or visit www.cannonfinancial.com.

DATES, LOCATIONS, TOPICS AND INSTRUCTORS ARE SUBJECT TO CHANGE
AN ADDITIONAL CHARGE MAY APPLY FOR REQUIRED MATERIALS

2 EASY WAYS TO REGISTER:

1) By Phone:
706-353-3346

2) On The Web:
www.cannonfinancial.com

2018 Cannon Schools Schedule

	Hilton Head, SC Sea Pines	LiveOnline™ Courses Spring	Pepperdine University Malibu, CA	University of Notre Dame South Bend, IN	Boston University Boston, MA	Chicago, IL Hilton	LiveOnline™ Courses Fall	Atlanta, GA AMA
PERSONAL TRUST SCHOOLS (CTFA)								
Cannon Trust Fundamentals		Begins Feb 23 rd		July 15 - 21			Begins Aug 17 th	
Cannon Trust School I	Jan 28 - Feb 3	Begins Feb. 19 th	May 20 - 26	July 15 - 21	Aug 5 - 11		Begins Aug 27 th	Sept 16 - 22
Cannon Trust School II	Jan 28 - Feb 3	Begins Feb. 19 th	May 20 - 26	July 8 - 14	Aug 5 - 11		Begins Aug 27 th	Sept 16 - 22
Cannon Trust School III	Jan 28 - Feb 3		May 20 - 26	July 8 - 14	Aug 5 - 11			Sept 16 - 22
Cannon Trust Issues & Updates		TBD						
Financial Advisors Course on Trusts						Aug 20 - 21		
Special Needs Trusts	Jan 22 - 23					Aug 20 - 21		
Charitable Foundation Management								
TAX SCHOOLS								
Trust Tax School				July 15 - 21				
SECURITIES OPERATIONS SCHOOLS (CSOP)								
Securities Operations I			May 20 - 26	July 8 - 14			Begins Sept 28 th	
Securities Operations II			May 20 - 26	July 8 - 14			Begins Sept 28 th	
Securities Operations III			May 20 - 26	July 8 - 14				
Securities Operations Issues & Updates		TBD						
TRUST AUDIT, COMPLIANCE & RISK MANAGEMENT SCHOOLS (CFIRS)								
Trust Audit, Compliance & Risk Management I	Jan 21 - 27	Begins Feb. 16 th	May 13 - 19	July 15 - 21	Aug 5 - 11			
Trust Audit, Compliance & Risk Management II	Jan 21 - 27	Begins Feb. 16 th	May 13 - 19	July 15 - 21				
Trust Audit, Compliance & Risk Management III	Jan 21 - 27		May 13 - 19	July 15 - 21				
Trust Audit, Compliance & Risk Management Issues & Updates		TBD						
INVESTMENT SCHOOLS (AFIM)								
Investment Management I	Jan 21 - 27						Begins Sept 28 th	
Investment Management II	Jan 28 - Feb 3							
Unique and Hard To Value Assets				July 8 - 14				
Investment Management Issues & Updates		TBD						
CORPORATE TRUST SCHOOLS (CCTS)								
Corporate Trust I					Aug 5 - 11			
Corporate Trust II							Begins Aug 27 th	
Corporate Trust III	Jan 28 - Feb 3							
Corporate Trust Issues & Updates		TBD						
RETIREMENT PLANNING SCHOOLS (CRSP)								
Retirement Plan Services I - Fundamentals		Begins March 2 nd						
Retirement Plan Services II			May 13 - 19					
Retirement Plan Services III				July 15 - 21				
Retirement Plan Services IV					Aug 5 - 11			
IRA Professional School					Aug 5 - 11			
Retirement Plan Services Issues & Updates		TBD						
RELATIONSHIP MANAGEMENT SCHOOLS								
Capitalizing on the Insurance Opportunity						August 20 - 21		Sept 17 - 18
Sales and Practice Management (CWS® I)		TBD				August 20 - 21		Sept 17 - 18
Client Interaction Skills (CWS® II)						August 20 - 21		Sept 17 - 18
Certificate in Behavioral Finance						August 20 - 21		
LEADER DEVELOPMENT SCHOOLS								
Performance Coaching I	Jan 22 - 23							
Performance Coaching II	Jan 24 - 25							



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Powerful Training Events you Cannot Afford to Overlook

For More Information or to Register go to www.cannonfinancial.com



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