



2019
Schools Schedule
& Registration





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 & 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 submitted to the National Registry of CPE Sponsors through its website: www.NASBARegistry.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 CFP® 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.

ABA PROFESSIONAL CERTIFICATIONS

ABA Professional Certifications 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.

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

	Hilton Head, SC Sea Pines	Pepperdine University Malibu, CA	University of Notre Dame South Bend, IN	Boston University Boston, MA	Chicago, IL Hilton	Atlanta, GA AMA	Online Campus
PERSONAL TRUST SCHOOLS (CTFA™)							
Cannon Trust Fundamentals		May 12 - 18	July 14 - 20				Begins Feb 22 & Aug 16
Cannon Trust School I	Feb 3 - 9	May 19 - 25	July 14 - 20	Aug 4 - 10		Sept 15 - 21	Begins Feb 25 & Aug 26
Cannon Trust School II	Feb 3 - 9	May 19 - 25	July 7 - 13	Aug 4 - 10		Sept 15 - 21	Begins Feb 25 & Aug 26
Cannon Trust School III	Feb 3 - 9	May 19 - 25	July 7 - 13	Aug 4 - 10		Sept 15 - 21	Available Now
Cannon Trust School Issues & Updates					Aug 19 - 20		Available Now
Special Needs Trusts					Aug 19 - 20		
Charitable Foundation Management					Aug 19 - 20		
Family Business Succession					Aug 19 - 20		
TAX SCHOOLS							
Trust Tax Fundamentals			July 14 - 20				
Estate, Gift & Generation Skipping Tax Fundamentals			July 11 - 12				
Trust Taxation for Trust Officers			July 8 - 9				
SECURITIES OPERATIONS SCHOOLS (GSOP™)							
Securities Operations I		May 19 - 25	July 7 - 13				Begins Sept 27 th
Securities Operations II		May 19 - 25	July 7 - 13				Begins Sept 27 th
Securities Operations III		May 19 - 25	July 7 - 13				Available Now
Securities Operations Issues & Updates							
TRUST AUDIT, COMPLIANCE & RISK MANAGEMENT SCHOOLS (CFIRS®)							
Trust Audit, Compliance & Risk Management I	Jan 27 - Feb 2	May 12 - 18	July 14 - 20	Aug 4 - 10			Begins Feb. 15 th
Trust Audit, Compliance & Risk Management II	Jan 27 - Feb 2	May 12 - 18	July 14 - 20				Begins Feb. 15 th
Trust Audit, Compliance & Risk Management III	Jan 27 - Feb 2	May 12 - 18	July 14 - 20				Begins Feb. 15 th
Trust Audit, Compliance & Risk Management Issues & Updates					Aug 19 - 20		Available Now
ERISA Compliance					Aug 19 - 20		
INVESTMENT SCHOOLS (AFIM®)							
Fiduciary Investment Management I							Begins Sept 26 th
Fiduciary Investment Management II	Jan 27 - Feb 2						
Unique and Hard To Value Assets			July 7 - 13				
CORPORATE TRUST SCHOOLS (CCTS™)							
Corporate Trust I							Begins Feb. 15 th
Corporate Trust II				Aug 4 - 10			
Corporate Trust III	Feb 3 - 9						
RETIREMENT PLANNING SCHOOLS (CRSP™)							
Retirement Plan Services I - Fundamentals							Begins March 1 st
Retirement Plan Services II		May 12 - 18					
Retirement Plan Services III			July 7 - 13				
Retirement Plan Services IV						Sept 15 - 21	
IRA Professional School				Aug 4 - 10			
RELATIONSHIP MANAGEMENT SCHOOLS							
Capitalizing on the Insurance Opportunity					Aug 19 - 20		
Sales and Practice Management (CWS® I)				April 8-9 & Aug 19-20		Sept 16 - 17	Available Now
Client Interaction Skills (CWS® II)				April 8-9 & Aug 19-20		Sept 16 - 17	
Certificate in Behavioral Finance					Aug 19 - 20		

Dates in **maroon** = Call to register
 Dates in **orange** = Register now at
<https://online-learning.cannonfinancial.com/catalog>



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

