

Special Rules by State:

Arkansas: Attendees requesting Arkansas insurance CE credit must complete both the Student Information Sheet AND the State Specific Arkansas Roster (Appendix H), which will be supplied the day of class. For CLE for attorneys, the course monitor should not be an attorney seeking CLE credit.

Delaware: Course monitor for CLE for attorneys must be a New York Life agent or employee.

Florida: Florida venues must have a Florida approved instructor on site. The only approved instructors and venues are as follows. If you would like to be added, please contact Heather.Davis@newyorklife.com by March 31.

FLORIDA APPROVED INSTRUCTOR LIST FOR INSURANCE CE PER VENUE

General Office	Approved Instructor	Name of Venue	Venue Street Address	Venue City	Venue State	Venue Zip
South Florida	David Walter	New York Life – Brickell Avenue, Miami	801 Brickell Avenue, Suite 1440	Miami	Florida	33131
South Florida	Robert Spak	Spak Financial Services	12260 SW 53 Street, Suite 602	Cooper City	Florida	33330
Tampa	Curt Eskew	Community Foundation of Sarasota	2635 Fruitville Rd.	Sarasota	Florida	34237
Jacksonville	Carolyn Anders	New York Life – Jacksonville GO	7880 Gate Pkwy., Ste. 200	Jacksonville	Florida	32256
Orlando	Christopher Rich	New York Life Orlando	495 North Keller Rd., Suite 150	Maitland	Florida	32751
South Florida	Patrick Jones	South Florida General Office	1300 Concord Terrace, Fifth Floor	Sunrise	Florida	33323
South Florida	Daniel Pico	Doral Sales Office	3750 NW 87 th Ave., Suite 500	Doral	Florida	33178
South Florida	Dale Gorchoff or Steven Fiedler	Palm Beach Gardens Sales Office	7111 Fairway Drive, Suite 202	Palm Beach Gardens	Florida	33418
Jacksonville	John (Jay) Gin III	Ginn Financial Group	421 Saint Johns Avenue, Suite 3	Palatka	Florida	32177
South Florida	Peter Lovley	Bonita Springs Satellite Office	8200 Health Center Blvd., Suite 104	Bonita Springs	Florida	34135
Tampa	Betsy Jerner	Tampa General Office	3109 W. Dr. MLK Blvd. Suite 300	Tampa	Florida	33607

Georgia: For CLE for attorneys, the facility should be set up in classroom or similar style to provide a writing surface for each pre-registered attendee, to provide a minimum of two linear feet of table space per chair, and should provide sufficient space behind the chairs in each row to permit easy access and exit to each seat. Crowding in the facility detracts from the learning process and will not be permitted.

Idaho: In order to offer CLE credit to attorneys, three or more attorneys must be present at your venue.

Indiana: In order to offer CLE credit to attorneys, a subject matter expert must be on site AND a bio needs to be on file with Kaplan by April 28, 2017. The bio must be emailed to Wanda.Fillner@kaplan.com. Additionally, the course monitor for CLE credit MUST be an attorney. The attorney monitor will also receive CLE credit.

Minnesota: Attendees requesting Minnesota insurance CE credit must pass an exam with a score of 70% or higher. Attendees and monitor must sign a Minnesota DOI affidavit in addition to a Student Information Sheet, which will be supplied the day of class.

Mississippi: Course monitor for CLE for attorneys must be a New York Life agent or employee.

Montana: In order to offer CLE credit to attorneys at your venue, four or more participants/attendees must be present.

Nevada: The sponsor must utilize a method of monitoring continuous attendance by ensuring that continuous use of cell phones and computers, or the continued attention to unrelated reading materials during the course or activity is prohibited. The sponsor must use reasonable methods to ensure continuous attendance to include sign in sheets that shall be signed upon arrival at the course or activity, and not made available for exit signature until the course is completed.

New Jersey: In order to offer CLE credit to attorneys, a subject matter expert must be on site AND a bio needs to be on file with Kaplan by April 28, 2017. The bio must be emailed to Wanda.Fillner@kaplan.com. A representative of the sponsor/organizer of the seminar shall confirm the monitor's attendance. NO signing for themselves.

North Carolina: In order to offer CLE credit to attorneys, three attendees must be present. The course monitor should NOT be someone seeking CLE credit.

Ohio: Ohio insurance agents have both a license number and a NPN (National Producer Number). Attendees requesting Ohio Insurance CE credit must provide their NPN number for reporting credits. In order to offer CLE credit for attorneys, the program sponsor is required to monitor the attendees and deduct absences of more than 15 minutes from the attendee's record. The Commission also relies on sponsors to take reasonable efforts to ensure that attendees are actively engaged in the CLE activity. Such reasonable efforts include, but are not limited to, an announcement at the beginning of the program and after breaks asking attendees to turn off phones and electronic devices and to put away newspapers and other materials not related to the activity.

Oklahoma: In order to offer CLE credit to attorneys, the venue must have a minimum of five attendees present.

Pennsylvania: In order to offer CLE credit to attorneys, a Subject Matter Expert (SME) is required to be onsite.

South Carolina: In order to offer CLE credit to attorneys, a subject matter expert must be on site AND a bio needs to be on file with Kaplan by April 28, 2017. The bio must be emailed to Wanda.Fillner@kaplan.com.

Vermont: In order to offer CLE credit to attorneys, a minimum of three attendees must be present.

Virginia: In order to offer CLE credit to attorneys, a minimum of two attorneys must be present.

Washington: Attendees requesting Washington insurance CE credit must pass an exam with a score of 70% or higher.

West Virginia: In order to offer CLE credit to attorneys, the course monitor should be a representative of New York Life who is not an attorney seeking CLE credit.

Wisconsin: Attendees requesting Wisconsin insurance CE credit must provide their NPN (National Producer Number). The license number issued prior to Summer 2016 is no longer valid. In order to offer CLE credit to attorneys, a minimum of two attendees and one course monitor must be present.

Questions? Please contact Kaplan at KFS_CHelp@kaplan.com

Specific venues that may offer insurance CE credit to agents holding resident insurance licenses in a different state:

Unless your venue appears on this list, life insurance agents must attend the Feldman Forum in the state in which they hold their resident insurance license in order to receive insurance CE credit, as approved by that state. (This rule does not apply to other professionals seeking credit.)

2017 FF Id#	General office	Coordinator name	Also Approved in	Also Approved	Shipping zip	Name of venue	Venue street address	Venue city	Venue state	Venue zip
227	Home Office	Darla Bean	California ICE		75001	The Nautilus Group	15305 Dallas Pkwy, Suite 1050	Addison	Texas	75001
207	V68	David Wibisono	New Jersey ICE		11374	Queens General Office	95-25 queens blvd 4th floor	Rego Park	New York	11374
193	Toledo Ohio	Karen Stevens	Michigan ICE		43537	Claddagh	5001 Monroe Street, Suite R4 Suite	Toledo	Ohio	43623
186	Colorado	Renae Morrish	Nebraska ICE		80528	Fort Collins Sales Office	3003 E. Harmony Rd Suite 110	Fort Collins	Colorado	80528
185	Greater Pasadena	Chris Kolbeck	Oregon ICE		91203	New York Life Greater Pasadena	801 N. Brand Blvd. Penthouse Suite	Glendale	California	91203
175	Great Plains GO/D05	Kristin Beswick	South Dakota ICE		57049	Joe Kruse at Stoney Creek Inn (Sioux City, IA)	300 3rd Street	Sioux City	Iowa	51101
168	Michigan	Cliff Hawkins	Indiana ICE		49024	New York Life	1350 W Centre Ave Suite 200	Portage	Michigan	49024
134	QUEENS	David Wibisono	New Jersey ICE		11374	Queens General Office Training Room	95-25 Queens Blvd. 4th Floor	Rego Park	New York	11374
128	Chicago North Shore D33	Kirk Johnson	Indiana ICE	Alabama ICE	60015	New York Life	520 Lake Cook Road Suite 600	Deerfield	Illinois	60015
125	Roanoke, Virginia	Spencer Wilson	Tennessee ICE		24018	Roanoke General Office	2965 Colonnade Drive, Suite 220	Roanoke	Virginia	24018
115	New Hampshire	Charles Rogers	Massachusetts ICE		03101	New York Life General Office	1155 Elm Street 8th Floor	Manchester	New Hampshire	3101
113	Greater Washington	Robert McLaughlin	Virginia ICE		20817	Greater Washington general office	6901 rockledge dr. Suite 500	Bethesda	Maryland	20817
97	D23	Walter Krop	Indiana ICE		60477	New York Life Tinley Park	7840 Graphic Dr STE 200	Tinley Park	Illinois	60477
91	Constitution	Bianca Tancredi	Delaware ICE	New Jersey	19004	New York Life	555 E City Line Ave Suite 800	Bala Cynwyd	Pennsylvania	19004
88	Nebraska	Curt Christensen	Iowa ICE		68154	Nebraska General Office	1 Valmont Plaza Suite 100	Omaha	Nebraska	68154
66	Orlando	Christopher Rich	Pennsylvania		32751	New York Life Orlando General	495 North Keller Rd Suite 150	Maitland	Florida	32751
65	Arizona	Michael Nemger	Nevada ICE		85254	New York Life Insurance	14850 N. Scottsdale Road Suite 400	Scottsdale	Arizona	85254
43	Norfolk	Edward Stein	North Carolina		23510	Norfolk GO	993 Waterside Dr Suite 1500	Norfolk	Virginia	23510
45	South Jersey	Anna Davis	Pennsylvania ICE		08054	South Jersey General Office	1000 Atrium Way suite 500	Mount Laurel	New Jersey	8054
41	Greater Kansas City (D51)	Christian Crumpacker	Missouri ICE		66210	Overland Park, KANSAS - Greater Kansas City G.O.	7500 College Blvd. Suite 800	Overland Park	Kansas	66210
21	Greater New York	Mark Kinasewitz	New Jersey ICE		10170	Greater New York	420 Lexington Ave. 15th Flr	New York	New York	10170
17	Charlotte General Office	Kelli Unwin	South Carolina ICE		28210	New York Life Charlotte General Office	6100 Fairview Rd Ste 400	Charlotte	North Carolina	28210
15	NEW ORLEANS	MICHAEL TRAPANI	Mississippi ICE		70113	NEW ORLEANS GENERAL OFFICE	639 LOYOLA AVE., #1900	NEW ORLEANS	Louisiana	70113
8	Manhattan	Denis Gogh	New Jersey ICE		10271	Manhattan General Office	120 Broadway 29th Floor	New York City	New York	10271
7	Wyoming 536	David M Anderson	Nebraska ICE		82609	Wyoming G.O.	6000 E. 2nd Street Suite 2001	Casper	Wyoming	82609

**State Approval Status in Credit Hours for 2017 Feldman Forum
As of 4-28-2017**

State	CLE for Attorneys	CPE for Accountants (NASBA)	CPE for IRS Enrolled Agents	CE for Insurance Professionals*	CFP for Financial Professionals	Professional Recertification for American College Designations**
Alabama	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Alaska	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Arizona	<i>(See note below.)</i>	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Arkansas	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
California	Not available.	4.0 Taxes	4.0 hours	4.0 Life	4.0 General	Yes
Colorado	4.0 hours General	4.0 Taxes	4.0 hours	4.0 LAH	4.0 General	Yes
Connecticut	<i>(See note below.)</i>	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Delaware	3.5 hours General	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
District of Columbia	<i>(Non-mandatory CLE state.)</i>	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Florida	4.0 hours	4.0 Taxes	4.0 hours	4.0 Generic LHV	4.0 General	Yes
Georgia	3.5 hours	4.0 Taxes	4.0 hours	4.0 Life	4.0 General	Yes
Hawaii	3.5 hours	4.0 Taxes	4.0 hours	4.0 LAH	4.0 General	Yes
Idaho	<i>pending</i>	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Illinois	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Indiana	3.5 hours General	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Iowa	3.5 hours General video replay	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Kansas	4.0 hours <i>(See note below.)</i>	4.0 Taxes	4.0 hours	4.0 LHV	4.0 General	Yes
Kentucky	3.5 hours	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Louisiana	3.5 hours	4.0 Taxes	4.0 hours	4.0 hours	4.0 General	Yes
Maine	3.5 hours	4.0 Taxes	4.0 hours	3.0 General	4.0 General	Yes
Maryland	<i>(Non-mandatory CLE state.)</i>	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Massachusetts	<i>(Non-mandatory CLE state.)</i>	4.0 Taxes	4.0 hours	3.0 General	4.0 General	Yes
Michigan	<i>(Non-mandatory CLE state.)</i>	4.0 Taxes	4.0 hours	4.0 LAH	4.0 General	Yes
Minnesota	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Mississippi	3.5 hours General	4.0 Taxes	4.0 hours	4.0 LAH	4.0 General	Yes
Missouri	4.1 hours General	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Montana	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Nebraska	3.5 hours General	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Nevada	3.5 hours	4.0 Taxes	4.0 hours	4.0 LHV	4.0 General	Yes
New Hampshire	<i>(See note below.)</i>	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
New Jersey	4.2 hours General	4.0 Taxes	4.0 hours	4.0 hours L	4.0 General	Yes
New Mexico	3.5 hours	4.0 Taxes	4.0 hours	4.0 LHV	4.0 General	Yes
New York	4.0 hours	4.0 Taxes	4.0 hours	4.0 hours	4.0 General	Yes
North Carolina	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
North Dakota	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes

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Ohio	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Oklahoma	4.0 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Oregon	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Pennsylvania	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Rhode Island	4.0 hours General	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
South Carolina	3.5 hours	4.0 Taxes	4.0 hours	4.0 LAH	4.0 General	Yes
South Dakota	<i>(Non-mandatory CLE state.)</i>	4.0 Taxes	4.0 hours	4.0 LHV	4.0 General	Yes
Tennessee	3.83 hours***	4.0 Taxes	4.0 hours	4.0 LHV	4.0 General	Yes
Texas	3.5 hours	4.0 Taxation	4.0 hours	Denied	4.0 General	Yes
Utah	3.5 hours self-study	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Vermont	3.5 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Virginia	3.5 hours	4.0 Taxes	4.0 hours	4.0 LH	4.0 General	Yes
Washington	3.5 hours	4.0 Taxes	4.0 hours	2.0 General	4.0 General	Yes
West Virginia	4.2 hours	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Wisconsin	Denied	4.0 Taxes	4.0 hours	4.0 General	4.0 General	Yes
Wyoming	3.5 hours	4.0 Taxes	4.0 hours	4.0 hours	4.0 General	Yes

* For insurance professionals, in order to receive continuing education credit in most states, you must attend the event in the state where you hold your resident insurance license. Exceptions will be listed here by venue as they are approved.

** Participants who want professional recertification credit 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 credit received by the participant in his or her professional category, which will vary by state and by type of credit sought. If no other professional CE is requested by or awarded to the participant, he or she will be provided with a participation certificate provided by Kaplan for 4 hours of credit for American College designations.

*** Tennessee CLE approved for the following venues: Memphis, Knoxville, Cookville, Franklin

NOTES:

Arizona: The State Bar of Arizona does not approve or accredit CLE activities for MCLE requirements of specialists. This activity may qualify for up to 3.50 hours of intermediate level training in the area Taxation.

Connecticut: Connecticut Bar Association does not approve or accredit CLE activities for MCLE requirements. This activity may qualify for up to 3.5 hours of General credit.

Kansas: 4.0 hours of CLE approved for Wichita, Manhattan, Lawrence, and Overland Park venues.

New Hampshire: This Course Provider offers this program and believes the course, and its written materials, meets the requirements of NH Supreme Court Rule 53 and MAY qualify for 210 minutes of NHMCLE General credit.