Whole Family Advisor®
Fall 2026 Program Timeline

GETTING STARTED: Registration & Kickoff

- August 20 — Program Registration
- August 27 — KICKOFF CALL | 4:00-5:00pm ET

COURSE ONE: Becoming the Whole Family Advisor®

- Complete Self-Study Assignments Before Live Call 1
- September 3 — LIVE CALL 1 | 4:00-5:30pm ET
- Complete Self-Study Assignments before Live Call 2
- September 17 — LIVE CALL 2 | 4:00-5:30pm ET
- Complete Becoming the Whole Family Advisor® Assessment
  - Fill out the CE request form to apply for CFP or CPWA credits

COURSE TWO: Family Engagement Tools

- Complete Self-Study Assignments Before Live Call 3
- October 1 — LIVE CALL 3 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 4
- October 15 — LIVE CALL 4 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 5
- October 29 — LIVE CALL 5 | 4:00-5:30pm ET
- Complete Self-Study Assignments Assignments
- Complete Family Engagement Tools Assessment
  - Fill out the CE request form to apply for CPWA credits

COURSE THREE: Essential Skills

- Complete Self-Study Assignments Before Live Call 6
- November 12 — LIVE CALL 6 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 7
- November 19 — LIVE CALL 7 | 4:00-5:30pm ET
- Complete Essential Skills Assessment
  - Fill out the CE request form to apply for CFP or CPWA credits

COURSE FOUR: Multigenerational Family Meetings

- Complete Self-Study Assignments Before Live Call 8
- December 3 — LIVE CALL 8 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 9
- December 10 — LIVE CALL 9 | 4:00-5:30pm ET
- Complete Multigenerational Family Meetings Assessment
  - Fill out the CE request form to apply for CFP or CPWA credits

GRADUATION from WFA Training Program

LEGACY CAPITALS ACADEMY

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