Whole Family Advisor®
Spring 2027 Program Timeline

GETTING STARTED: Registration & Kickoff

- March 4 — Program Registration Deadline
- March 11 — KICKOFF CALL | 4:00-5:00pm ET

COURSE ONE: Becoming the Whole Family Advisor®

- Complete Self-Study Assignments Before Live Call 1
- March 18 — LIVE CALL 1 | 4:00-5:30pm ET
- Complete Self-Study Assignments before Live Call 2
- April 1 — 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
- April 15 — LIVE CALL 3 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 4
- April 29 — LIVE CALL 4 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 5
- May 13 — 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
- May 27 — LIVE CALL 6 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 7
- June 10 — 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
- June 24 — LIVE CALL 8 | 4:00-5:30pm ET
- Complete Self-Study Assignments Before Live Call 9
- July 8 — 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
Gain Access to Certification and Membership

LEGACY CAPITALS ACADEMY