

Whole Family Advisor®

Spring 2027 Program Timeline



GETTING STARTED: Registration & Kickoff

- March 4 ● Program Registration Deadline
- March 11 ● KICKOFF CALL | 12:00-1:00pm ET

COURSE ONE: Becoming the Whole Family Advisor®

- Complete Self-Study Assignments Before Live Call 1
- March 18 ● LIVE CALL 1 | 12:00-1:30pm ET
- Complete Self-Study Assignments before Live Call 2
- April 1 ● LIVE CALL 2 | 12:00-1:30pm 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 | 12:00-1:30pm ET
- Complete Self-Study Assignments Before Live Call 4
- April 29 ● LIVE CALL 4 | 12:00-1:30pm ET
- Complete Self-Study Assignments Before Live Call 5
- May 13 ● LIVE CALL 5 | 12:00-1:30pm 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 | 12:00-1:30pm ET
- Complete Self-Study Assignments Before Live Call 7
- June 10 ● LIVE CALL 7 | 12:00-1:30pm 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 | 12:00-1:30pm ET
- Complete Self-Study Assignments Before Live Call 9
- July 8 ● LIVE CALL 9 | 12:00-1:30pm 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