Chapter CPE Agreement

INSTRUCTIONS

CFMA HQ can issue CPE credits to attendees of Chapter seminars, regional conference/s or one-two day events as long as certain requirements are met. CFMA HQ will need approximately 4 weeks prior to event to issue CPE for attendees.

1. Host Chapter should notify CFMA HQ of the event as soon as it is scheduled (at least 4 weeks in advance) and provide CFMA with the following:
   - Event title and summary;
   - Date, time, location;
   - Three learning objectives;
   - Registration info;
   - Indicate level (basic, intermediate or advanced), prerequisites if any, and who should attend;
   - Speaker bio/s; and
   - CPE field of study
   - Chapter needs to include NASBA CPE logo and verbiage on marketing material. That can be obtained by CFMA HQ.

2. Upon request, CFMA HQ can help chapters promote the event by creating a flyer and sending an e-blast to chapter members and to nearby chapters to help encourage registrations.

3. The chapter is responsible for program promotion/marketing if the event is promoted through the chapter’s website, and the link must be provided to CFMA national for review.

4. Chapters will be issued a code word to monitor attendance of registrants and that will allow attendees access to an online evaluation to obtain their CPE certificates.

To use a session code word:
   a. CFMA will provide a code word to the Chapter Coordinator.
   b. The code word should be announced by the presenter(s) during the Chapter event.
   c. Attendees will receive an email from CFMA Support containing instructions to access their evaluation and CPE certificate online.
   d. When the attendees log in to complete their online evaluation, they need to enter the code word that was provided during the live event to access their evaluation and receive their CPE Certificate.

For Chapters that comply with the provisions above, CFMA HQ agrees to provide the following:

1. Support and facilitation to the Chapter throughout this process to ensure NASBA compliance for the Chapter event.

2. Attendee access to evaluations and CPE certificates via email or through CFMA’s Online Education portal within 2 weeks of the end of the event and if all above stated materials have been received. Evaluation of event/instructor and attendee feedback.

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If you are in agreement with the terms listed on the previous page, please fill out and e-mail this form to rriedesel@cfma.org.

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<thead>
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<th>Title of Event</th>
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<tbody>
<tr>
<td>Hosting Chapter</td>
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<tr>
<td>Chapter Coordinator</td>
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<td>Company/E-Mail Address/Phone Number</td>
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Sue Madden  
*Education Manager  
*Construction Financial Management