

Sponsor Program CE Registration

Gain the competitive advantage of the AFP Sponsor Program Registration

With training dollars shrinking, certified professionals have become more selective in choosing programs offering Continuing Education (CE) credits. Get your program noticed by promoting it to a targeted audience of financial professionals. AFP will provide you with the documentation you need to show your program qualifies for CTP/CCM or FP&A recertification credits.

Sponsor Guidelines and Licensing Requirements

AFP's Certification Designations

- Certified Treasury Professional (CTP)
- Certified Cash Manager (CCM)
- Certified Corporate Financial Planning & Analysis Professional (FP&A)

CTP/CCM

AFP's CTP/CCM designations reflect an individual's knowledge of corporate treasury and cash management practices and represent the highest standard of professionalism in treasury and cash management. To date, more than 36,00 individuals have earned the certification by successfully passing a rigorous examination and meeting work experience requirements.

CTP/CCM designees represent corporate and governmental professionals with broad responsibilities in the treasury field. The CTP/CCM certifications also enhance customer relations for bankers, financial services and management consultants, and providers of related services.

CTPs/CCMs must earn and report 36 CE credits every three years to maintain their credential.

FP&A

A Certified Corporate FP&A Professional provides insights to the financial decision making process in an organization through financial projections (planning, budgeting and forecasting) and analysis. They understand the entire decision support process and are able to contribute to and be responsible for individual components of the process.

This credential, launched in 2013, helps to set the standard of professionalism in the financial planning & analysis profession while promoting ongoing career development.

Certified FP&A Professionals must earn and report 45 CE credits every three years.

Program Registration

AFP encourages organizations to provide timely continuing education activities to their members, clients, customers, prospects and/or personnel. And, because the CTP/CCM and FP&A credentials have continuing education requirements, many providers of continuing education events apply for CTP/CCM and FP&A sponsor registration. By submitting their CE events for administrative review and registration processing, organizations seeking to include the CTP and/or FP&A logos and program approval in their promotional literature can help boost their attendance numbers.

Note: CTPs, CCMs and Certified FP&A Professionals report recertification credits directly to AFP, and are not required to obtain course approval in advance of participating in a continuing education activity.

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Qualifying Programs

CTP/CCM

Under AFP's CTP recertification guidelines only programs covering topics in treasury/cash management, finance, economics, and accounting are eligible for CTP/CCM recertification credits.

Examples of programs that do not qualify for CTP/CCM credits:

- Sessions specific to the benefits and features of a company's treasury/finance related products and services
- Fundamental, introductory or CTP exam-prep courses in finance or cash/treasury management
- Personal career development sessions not specific to the finance or cash/treasury management fields
- Business development/sales skills sessions
- Technology-specific courses such as, but not limited to, Quickbooks and Microsoft Word
- Archived webinars/Teleconferences without assessments.

FP&A

Under AFP's Certified FP&A Professional recertification guidelines, only programs covering topics related to gathering, interpreting, understanding and communicating business and financial information and building and interpreting financial projections are eligible for FP&A recertification credits.

Examples of programs that do not qualify for FP&A credits:

- Organizational products/services and /or sales-specific marketing or business development presentations.
- Fundamental or introductory level courses or exam-prep courses in corporate financial planning and analysis.
- Non-finance related computer software application courses such as MS Word (Excel and presentation software courses are eligible).
- Personal career development topics not specific to management of finance
- Personal finance or personal financial planning topics
- Corporate banking and payments topics.
- Archived webinars/Teleconferences without assessments.

Description of Program Delivery Methods

University/College Courses: Offered by a college or university, generally over the course of a semester or trimester. Instructor-led, either face-to-face or online. Includes at least one, usually multiple, assessments throughout the duration of the course. Credits are earned at the rate of four (4) CE credits per semester hour.

Conferences: An event lasting one or more days that offers attendees the opportunity to choose from concurrent sessions on a variety of topics. Credit is determined by the total of available 50-minute classroom sessions one person could reasonably attend in their entirety.

Seminars: An event covering one topic that lasts as few as 50 minutes up to several days. Credit is determined by dividing the total minutes of instruction, less breaks and meals, by 50.

Professional Skills: Seminars, conferences, etc. concerning subject matter not specific to the treasury/finance/accounting/financial planning & analysis profession. Acceptable professional skills topics include the ability to communicate effectively, creative thinking, problem solving and presentation and storytelling. Credit is determined by dividing the total minutes of instruction, less breaks and meals, by 50.

Self-Directed and Prerecorded Offerings: Courses that are not taught in a face-to-face setting by an instructor or presenter, such as self-directed online courses and prerecorded/archived webinars, must include an assessment and certificate of completion to be eligible for approval. Assessments must have a minimum of 10 questions per CE credit and must require at least an 80% passing score. Credit is determined by dividing the total minutes of instruction by 50.

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Partial Credit Program Registration

AFP may approve selected portions of a program as eligible for CTP/CCM and/or FP&A recertification credits. In this occurrence, the sponsor will be informed of the sessions that are not approved for credits. Sponsors must then inform attendees/registrants of qualifying and non-qualifying sessions.

Logos and Approved Tag Lines

Promotional materials for programs approved by AFP for CTP/CCM credits must reference the following tag line:

Approved for up to _____ CTP/CCM recertification credits by the Association for Financial Professionals.

Promotional materials for programs approved by AFP for FP&A credits must reference the following tag line:

Approved for up to _____ FP&A recertification credits by the Association for Financial Professionals.

The sponsor must receive prior authorization from AFP to alter the approved tagline. Logos are available in .tif and .gif formats.

Application Process

Organizations interested in having their program reviewed for CTP/CCM and/or FP&A recertification credits must submit the following at least two weeks before the approval is needed:

- A completed Sponsor Program Application. This includes a Limited License Agreement for use of the logos, and the approved AFP tag lines.
- Program agenda indicating session title, content description, speaker name and bio, event date, length of each session (start and end times), scheduled breaks and/ or meals.
- Description of the method of assessment and a sample “certificate of completion” if applicable.
- Registration Fee

Incomplete applications will not be processed.

Each program requires a separate application. Only one application needs to be submitted for a program that will be presented on multiple dates or locations. (Include all dates and locations on the application form.)

The licensing agreement and approval letter are effective for 1 year from the date of the letter. During this period the Sponsor will not be assessed an additional fee if the original program is repeated and the agenda remains unchanged. Once the agreement expires the Sponsor must resubmit the program for approval.

The AFP Sponsor Program Application should be submitted at least two weeks prior to the program date. This ensures adequate time for processing and allows the sponsoring organization to use the logo(s) in their marketing materials. An expedited approval fee applies to applications requiring approval within three business days.

Confirmation of Approved Programs

Sponsors submitting qualifying continuing education programs will receive, via email, a letter confirming approval and camera-ready copies of the logo(s). The letter includes the attachment “Sponsor Program CE Application” which must be distributed to event participants so they may report and document the approved continuing education credits for that program.

Sponsors will be notified if a continuing education program is not approved.

Program Changes

Cancellation

The Sponsor must notify AFP and registrants/attendees if a program approved for CTP/CCM and/or FP&A credits is cancelled for any reason. Cancelled programs will be removed from the AFP Events Calendar if posted.

The Sponsor will be refunded 50% of the initial registration fee.

Changes to Agenda

The Sponsor must notify AFP if a program approved for CTP/CCM and/or FP&A credits is changed for any of the following reasons:

- Date and/or Location
The Sponsor will receive a revised approval letter and an updated registration form for distribution to attendees.
A new application is not required.
- Session Times
The Sponsor will receive a revised approval letter if credits are adjusted. *A new Sponsor Program Application and agenda must be submitted for review.*

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Changes to Agenda of Repeat Programs

If a program approved for CTP/CCM and/or FP&A credits is revised and is being repeated within the 1 year agreement a new application must be submitted for review.

Program Registration Renewal

A new Sponsor Program Application must be submitted to renew any program approved for CTP/CCM and/or P&A credits and that will be repeated after the agreement has expired.

Promoting Your Program Through AFP

Programs approved for CTP/CCM and/or FP&A credits may be listed on the AFP Industry Calendar, at http://www.afponline.org/pub/cal/Industry_Calendar.html. To promote a program approved for CTP/CCM and/or FP&A credits indicate your request on the Sponsor Program Application.

Determining CTP/CCM or FP&A Recertification Credits

Every 50 minutes of a qualifying program, including Q&A, is equivalent to one recertification credit. Scheduled meals and breaks are not included. To determine the number of credits a program offers, the total number of qualified minutes is divided by 50.

Fees

Program sponsors are assessed an administrative processing and logo usage fee of \$100 per approved recertification credit for each certification program.

For example, if a program is approved for 5.2 CTP/CCM recertification credits and 3.5 FP&A recertification credits, the approval fee would be \$870 ($5.2 + 3.5 = 8.7 \times \$100 = \870)

Prepayment by credit card is required for amounts of \$500 or less. Invoicing is available for amounts over \$500 only and payment is due within 30 days of invoice.

Note: The fee is waived for AFP/TMA Regional Associations

Expedited Approval Fees

Applications should be submitted two weeks in advance of when an approval is needed. When an approval is needed within three business days a \$35 day per credit expedited approval fee applies.

Note: This fee is NOT waived for AFP/TMA Regional Associations or annual contract holders.

Non-compliance Policies

The Limited License Agreement outlines the proper usage of the CTP and FP&A logos, and promotional tag line. Variations are prohibited.

Failure to comply with these policies may result in any or all of the following:

- Sponsor will not receive approval for their program.
- If the logo(s) and/or tag line(s) are included in a sponsor's promotional material without AFP's prior authorization the Sponsor must issue a retraction to the attendees/registrants.
- The Sponsor will be required to pay a fee, based on \$100 per CE credit, for the unapproved use of the logo(s) and/or tag line(s).
- The sponsor may be placed on probation and may not be permitted to submit future programs for CTP/CCM and FP&A credit approval.

Attendee Records

For auditing purposes all CTP/CCM and FP&A designees are required to retain proof of their participation in the CE programs being reported. Sponsors must therefore distribute the Sponsor Program Registration Form accompanying the approval letter to their program attendees/registrants.

For more information on the Certified Treasury Professional and Certified Corporate FP&A Professional credentials, please visit www.AFPonline.org and click "Certification."



Sponsor Program CE Application

Registration Form

1 of 2

This form may be reproduced. Both the Sponsor Program CE Registration and the Limited License Agreement must be completed. Applications **must** include a schedule/agenda indicating session topics, content description, lengths of sessions, speakers, bios, scheduled breaks and meals.

If AFP receives the registration application in ample time, the title of the program, dates offered, location, sponsor and contact information will be included on the Event Calendar located on the AFP website at www.AFPonline.org.

PROGRAM WEBSITE: _____

☐ LIST THIS PROGRAM ON AFP'S EVENTS CALENDER ☐ DO NOT LIST THIS PROGRAM ON AFP'S EVENTS CALENDER

1. SPONSOR ORGANIZATION NAME: _____

2. CONTACT PERSON: ☐ MR. ☐ MS. ☐ MRS. ☐ DR. _____

3. TITLE: _____

4. COMPANY: _____

5. ADDRESS: _____

CITY: _____ STATE/PROV: _____ ZIP/POSTAL CODE: _____

PHONE (OFFICE): _____ FAX: _____

E-MAIL: _____

6. PROGRAM TITLE: _____

7. PROGRAM DATE(S): _____ PROGRAM LOCATION(S): _____

8. NUMBER OF RECERTIFICATION CREDITS X \$100 = \$ _____

☐ FEE INCLUDED ☐ FEE WAIVED (AFP/TMA REGIONAL ASSOCIATION)

9. PROGRAM APPROVAL REQUESTED:

- ☐ CTP/CCM
☐ FP&A
☐ Both CTP/CCM and FP&A

10. EXPEDITED APPROVAL REQUESTED: ☐ (\$35 PER CREDIT FEE APPLIES)

11. METHOD OF PAYMENT:

☐ CHECK ☐ AMERICAN EXPRESS ☐ DISCOVER ☐ MASTERCARD ☐ VISA ☐ WIRE TRANSFER (PLEASE CONTACT US WITH DATE PAID)

CARD NUMBER: _____ EXPIRATION DATE: _____

SIGNATURE: _____ (FOR CREDIT CARD PAYMENTS)

☐ INVOICE REQUESTED (AMOUNTS \$500 AND OVER ONLY. INVOICING NOT AVAILABLE FOR AMOUNTS LESS THAN \$500)

12. DATE APPROVAL NEEDED: _____

(PLEASE TAKE INTO ACCOUNT ANY MARKETING DEADLINES YOUR ORGANIZATION MAY HAVE AND ALLOW 2 WEEKS FOR PROCESSING)



Sponsor Program CE Application

CTP/CCM/FP&A Program Registration Limited License Agreement

2 of 2

Whereas _____ (hereinafter referred to as "Sponsor") has applied to the Association for Financial Professionals (AFP) for limited use of the certification logo(s) in advertising materials pertaining to the following program approved for CTP/CCM and/or FP&A recertification credits.

PROGRAM TITLE: _____ DATE(S): _____

This license permits a Sponsor to display the following logo(s) and statement(s) as specified herein:

_____ CTP logo and "Approved for up to _____ CTP/CCM recertification credits by the Association for Financial Professionals."

_____ FP&A logo and "Approved for up to _____ FP&A recertification credits by the Association for Financial Professionals."

This license is effective for one year from date of approval and is not subject to renewal. A new application is required.

Therefore, the Sponsor agrees to the following terms and conditions of this limited license:

1. All policies and guidelines will be followed as outlined in this brochure.
2. The CTP and FP&A logos remain the property of AFP at all times.
3. The Sponsor is not authorized to use the logo(s) for any programs or services other than those herein named in the limited license agreement.
4. The Sponsor agrees to display the officially recognized registration mark ® next to the lower right-hand corner of the CTP logo used in its authorized materials.
5. If approved for CTP/CCM credits, The Sponsor further agrees to include the following sentence immediately after the CTP logo with no intervening verbiage between the logo and the statement: "Approved for up to _____ CTP/CCM recertification credits by the Association for Financial Professionals."
If approved for FP&A credits, the Sponsor further agrees to include the following sentence immediately after the FP&A logo with no intervening verbiage between the logo and the statement: "Approved for up to _____ FP&A recertification credits by the Association for Financial Professionals."
6. The CTP logo may be displayed using either AFP's official CTP color logo, black only logo, or white logo as provided. The logo must be used as a single unit in its entirety. The logo may not be altered in any way.
The FP&A logo may be displayed using either AFP's official FP&A color logo, black only logo, or white logo as provided. The logo must be used as a single unit in its entirety. The logo may not be altered in any way.
7. The Sponsor agrees that the logos and the credit approval statements will not be positioned so as to imply an endorsement of the Sponsor's program(s) by AFP. Repeated misuse of the mark and statement will result in the Sponsor being banned from future participation in the Sponsor program.

ACCEPTED THIS _____ DAY OF _____, 20_____

SPONSOR NAME: _____

BY (PLEASE PRINT) : _____

TITLE: _____

SIGNATURE: _____

Please forward completed application to:

Sponsor Program CE Registration
Association for Financial Professionals
4520 East West Highway, Suite 800
Bethesda, Maryland 20814-3214 USA

OR

Fax to +1 301.907.2864.