

How do I become a Certified IRA Professional (CIP)?



Meet the Eligibility Requirements

Ascensus and the National Association of Federal Credit Unions (NAFCU) developed this nationally recognized designation exclusively for experienced credit union professionals who have IRA compliance or operations responsibilities. To qualify to take the Certified IRA Professional (CIP) certification examination, you must meet the following prerequisites.

- Have a minimum of two years of IRA compliance or operations experience or have achieved CIS II certification
- AND**
- Attend Ascensus' *IRA Online Institute*, *IRA Institute*, or another approved prerequisite no more than 60 days before the examination date
- OR**
- Have three years of IRA compliance or operations experience

Register for an Ascensus *IRA Institute*

IRA Online Institute

Session 1: February 27 – May 21, 2017

Session 2: September 5 – November 26, 2017

Investment: \$1,595

IRA Institute

Investment: First Attendee \$1,799

Each Additional Attendee \$1,699

Clearwater Beach, FL - June 12–16, 2017

Optional CIP Exam: 9:00 a.m. on Saturday, June 17, 2017

Location Wyndham Grand Resort
430 South Gulfview Blvd
Clearwater Beach, FL 33767

Room Rates \$199

Book by contacting the hotel directly (remember to ask for the Ascensus room block). Attendees will pay for their own room and will need to guarantee the room with a credit card.

Denver, CO - September 25–29, 2017

Optional CIP Exam: 9:00 a.m. on Saturday, September 30, 2017

Location Denver Marriott City Center
1701 California Street
Denver, CO 80202
303-297-1300

Room Rates \$190

Book by contacting the hotel directly (remember to ask for the Ascensus room block). Attendees will pay for their own room and will need to guarantee the room with a credit card.

Apply for CIP Examination

CIP Examination

To register for the CIP exam, visit our website at

<https://www.ascensus.com/TrainingServices/DesignationsEducationCredits/CIPDesignationNAFCU/index.htm>

Exam fee: \$275 Exam retake fee: \$275

Study Materials

IRA Online Institute

- All study materials are contained within the *IRA Online Institute* learning management system.
- If a student would like to purchase any reference materials, additional manuals (listed below) are available at a 10% discount.

IRA Institute

- Required reading and study materials will be available for use at the *IRA Institute*.
- If a student would like to purchase any reference materials, additional manuals (listed below) are available at a 10% discount.

Reference Materials Available For Purchase

eResource Center

Ascensus offers a comprehensive online library of technical reference manuals and government source documents. Updated regularly, the *eResource Center* provides retirement and savings plan professionals easy access to current rules, compliance regulations, reporting requirements, and the latest industry information.

Additional Manuals

- *IRA Reference Service*
- *IRA Fact Book*
- *IRA Compliance*

Note: *IRA Institute* attendees are not required to buy study materials.

Maintaining the CIP Designation

After earning the CIP designation, the next step is to maintain your designation by completing 24 hours of continuing education credits within the certification period. To maintain your designation, you can attend Ascensus seminars and advanced courses of study that have been approved by the Certified IRA Professional Advisory Board. Your CIP designation also may be maintained by successfully completing updated CIP examinations. Ascensus IRA seminars (including webinars), Ascend, and both *IRA Online Institute* and on-site *IRA Institute* are approved for CIP continuing education credits.

Register

 800-356-9140

 registrationassistance@ascensus.com

 www.ascensus.com

  