Continuing Education Reporting Enhancements Coming January 2020

By Devon Coquillard

Investments & Wealth Institute believes in the rigor of a continued competency standard in the form of continuing education (CE), but we also want to make the process simple and efficient for our stakeholders. Beginning January 1, 2020, individuals who hold the CIMA®, CPWA®, and RMA® certifications still will have three ways to report continuing education, but they also will have access to new, simplified reporting processes and online tools, particularly in the area of Self-Reported CE.

1. Premier CE: If you complete in-person or online continuing education from the Investments & Wealth Institute, you will have the Premier CE credit automatically applied to your record. This method of earning and reporting CE offers maximum assurance that the CE will count toward your continuing competency requirement. This CE is audit-proof.
2. Sponsored CE: If you complete in-person or online continuing education from a Registered CE Sponsor, you will be able to log into your Dashboard online and verify that CE hours were uploaded by the CE Sponsor. If the hours are not reported, you may enter a program ID and report the credit using our convenient online portal. Sponsored CE is subject to audit.
3. Self-Reported CE: If you complete in-person or online continuing education from an independent third party that is not the Institute or a registered CE Sponsor, you may still report those hours through your Dashboard online. Using the streamlined CE reporting tool, you will be asked to provide program details and attest to completion of the program. CE credit will be added automatically to your record upon entry and will require a CE fee. Self-Reported CE is subject to audit.

As a credentialing body, we take great pride in ensuring that your credentials remain relevant and that the requirements to maintain them are targeted and attainable. Ongoing education ensures that you remain up to date on applicable industry changes, concepts, and skills to better serve your clients.

For more information, visit: www.investmentsandwealth.org/cima/ce-reporting-changes.

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THREE TYPES OF CE
Approximately 200,000 hours of CE are reported annually by more than 10,000 certificants.*

* CIMA®, CPWA®, RMA®, and CIMC® designees are required to report 40 hours of CE every two years, including two hours of ethics, and one hour of tax and/or regulation.

** Quality CE provides the certification body with maximum assurance that the CE program being submitted meets accepted topics, for the appropriate time, with a guarantee of attendance.