

# CPWA Continuing Education Hours Submittal Form

Name \_\_\_\_\_ SS# (last 4 digits) \_\_\_\_\_  
(please print)

Company \_\_\_\_\_

**A completed application includes one or more of the following, where applicable:**

A detailed conference agenda that gives the time of each session and provides session overviews **and** proof of attendance (such as attendee list, receipt, or registration form).

If you attended a pre-approved CE program, you need only identify the program name, date, and number of approved CE hours in the space below.

Documentation of the actual time spent teaching or speaking before a class or audience (you will only be awarded hours for a class or speaking engagement once per year per subject matter).

Copies of published articles including documentation of the amount of time spent researching and writing.

**IF ANY OF THE ABOVE INFORMATION IS MISSING YOUR APPLICATION WILL NOT BE PROCESSED.**

(Please allow at least two weeks for your IMCA record to be updated)

Program Attended :       Investment Related       Non-Investment Related

\_\_\_\_\_ Date \_\_\_\_\_

I attest that I have not been involved in any complaints or criminal, civil, self-regulatory organization or government agency disciplinary actions (in the past two years) and to the best of my knowledge no complaints are about to be filed.

Signature \_\_\_\_\_ Date \_\_\_\_\_

*If you are unable to sign the above statement please submit a written summary of the incident(s) with this form. If you have previously disclosed the incident(s) to IMCA already on your CPWA<sup>SM</sup> application or on a previous CE submittal form and nothing new has occurred, you may sign the statement.*

Effective January 1, 2009: IMCA's Certification Committee has approved a requirement that CE credit will be granted in one-hour-minimum increments. IMCA has defined "one hour" educational sessions as those lasting no fewer than 50 minutes. Therefore, all sessions submitted for CE must be a minimum of 50 minutes in order to qualify for one hour of CE.

To check your continuing education hours at any time, visit [www.imca.org](http://www.imca.org) and log in to My IMCA, then click "CPWA Detail".

Please keep a copy of all items for your records (including fax confirmations) and submit to:

IMCA  
5619 DTC Parkway  
Suite 500  
Greenwood Village, CO 80111  
Fax: 303.496.6105

CHARTERED PRIVATE WEALTH ADVISOR™

**CPWA**<sup>SM</sup>

**IMCA**

investment  
management  
consultants  
association