

# 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. You must meet the following prerequisites in order to qualify to take the CIP certification examination.

- Have a minimum of two years of IRA compliance or operations experience or have achieved CIS certification at the Expert level

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 23–May 18, 2015

Session 2: September 8–November 30, 2015

Investment: \$1,495

### *IRA Institute*

June 15–19, 2015 – Portland, OR

September 21–25, 2015 – Savannah, GA

Investment: \$1,795

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### Portland, OR – June 15–19, 2015

Optional CIP Exam: Saturday, June 20, 2015

**Location:** Hilton Portland & Executive Tower

921 SW Sixth Avenue

Portland, OR 97204

503-226-1611

#### Room Rates

\$169 – Main building (includes guestroom internet)

\$189 – Executive Tower (includes guestroom internet)

Book by contacting the hotel directly at

503-226-1611 (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.

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### Savannah, GA – September 21–25, 2015

Optional CIP Exam: Saturday, September 26, 2015

**Location:** Hyatt Regency Savannah

Two W Bay St.

Savannah, GA 31401

912-238-1234

#### Room Rates

\$185 – Single or Double (includes guestroom internet)

Book by contacting the hotel directly at

912-238-1234 (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.

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## Apply for CIP Examination

### CIP Examination

Upon receiving your registration for either the *IRA Online Institute* or the *IRA Institute*, Ascensus will email you a link to register to take the examination. If you have three years of IRA compliance or operations experience and intend to take the exam without attending one of the IRA Institutes, please email [registrationassistance@ascensus.com](mailto:registrationassistance@ascensus.com) to receive the CIP examination registration link.

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

## Reference Materials

### *IRA Online Institute*

- All reference materials are contained within the *IRA Online Institute* learning management system.
- If a student would like to purchase any reference materials, the materials listed below in 5(B) are available at a 10% discount.

### *IRA Institute*

- Required reading and reference materials will be available for use at the *IRA Institute*.
- If a student would like to purchase any reference materials, the materials listed below in 5(B) are available at a 10% discount.

## Reference Materials Available For Purchase

### *A. eResource Center*

In the retirement, health, and education savings industry, staying current on ever-evolving products, regulations, options, and trends is critical to success. Ascensus offers one of the most in-depth and informative online reference libraries available for today's retirement and savings plan professional.

### *B. Additional Manuals*

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

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