Checklist for IPT Local Luncheon Groups Co-Sponsored Presentations

The National Registry of CPE Sponsors is a program offered by the National Association of State Boards of Accountancy (NASBA) to recognize CPE program sponsors who provide continuing professional education (CPE) programs in accordance with nationally-recognized standards. Many State Boards of Accountancy require CPAs to earn required CPE credits through companies approved on the National Registry of CPE Sponsors. For a list of states that accept NASBA Sponsors, please follow this link: http://www.learningmarket.org/page.cfm/link=11.

IPT will co-sponsor Local Luncheon Group presentations on request so that attendees can earn CPE credits provided the following requirements are met:

A. IPT should be notified of the session at least 15 days prior to presentation using the online application found at the following link: http://ipt.llgprogram.squizmo.com/s3/
B. The presentation must qualify for at least 1 CE unit as defined by IPT standards. This is currently defined as 50 minutes of instruction on the topic.
C. Guidelines referenced on page 1, part 3 of this document must be followed.

The following steps will be required to complete the process:
- Prior to program
  o Complete the digital application available at http://ipt.llgprogram.squizmo.com/s3/. The following information will be needed to complete this online application:
    ▪ Name of Local Luncheon Group
    ▪ Name of Person submitting form:
    ▪ Contact Phone Number
    ▪ Contact E-mail
    ▪ Date of Meeting
    ▪ Time of Meeting
    ▪ Location of Meeting
    ▪ Total Instructional Time in minutes
    ▪ Total Minutes of Ethics Instruction applied for, if applicable
    ▪ Topic/Title of Luncheon Presentation
    ▪ Speaker’s Name and Company
    ▪ Attestation to the following: “I understand that if this session is approved, it is my responsibility to verify the time the speaker presented and submit the Local Luncheon Group sign-in sheet along with all of the required documentation after this for the IPT accreditation records.”

- After the program – The following items must be returned to the IPT office. The preferred method to return these items is to upload them at the following address: http://ipt.llgpostprogram.squizmo.com/s3/
  1. A copy of the promotional flyer including all items listed in Appendix C of this document
  2. Information on attendance monitoring procedure and copies of sign-in sheets with attendance information (list of who attended and their respective designation)
  3. A copy of the blank evaluation form and either copies of all forms submitted or a document containing a summary of the responses