Sample: Promotional Material

All co-sponsored presentations must identify IPT as a co-sponsor for accreditation purposes. Local Luncheon Groups must have the following eleven items in their promotional materials in order to comply with NASBA CPE requirements. Please see the next page for a sample flyer

1. Learning objectives

2. Instructional delivery method

3. Recommended CPE credit and recommended field of study (usually taxation or regulatory ethics) but can be any of the following as applicable: Accounting and Auditing (Accounting, Accounting – Governmental, Auditing, Auditing – Governmental); Consulting Services (Administrative Practice, Social Environment of Business); Ethics (Regulatory Ethics); Management (Business Law, Business Management & Organization, Finance, Management Advisory Services, Marketing); Personal Development (Behavioral Ethics, Communications, Personal Development, Personnel/HR); Specialized Knowledge & Applications (Computer Science, Economics, Mathematics, Production, Specialized Knowledge & Applications, Statistics); Taxation

4. Prerequisites

5. Advanced preparation required

6. Program level (Beginner, Intermediate, Advanced or Overview)

7. Program description

8. Course registration requirements

9. Refund and cancellation policy if a fee is charged for program

10. Complaint resolution policy

11. Official NASBA sponsor statement (Verbatim—CANNOT be modified)

Helpful Hints:

- Learning objectives can be addressed in a variety of ways from a descriptive paragraph to a bulleted list.

- Prerequisites should be specifically stated. If there are none, please state this fact. Programs that are classified as intermediate, advanced or update inherently build upon a prerequisite experience or education

- If program is free, stating “No fee” would address the refund policy; however a cancellation policy is still needed.

- The Official Registry Statement is required and must be included verbatim. IPT must be listed as a co-sponsor for CPE credit to be awarded.
IPT ANYNAME Local Luncheon Group

Update of Current Tax Developments

June 9th, 2015 12:30 p.m.
Anytown Restaurant, Anycity, GA

This presentation will cover current judicial and legislative developments in state and local tax. The speakers will also highlight proposed legislation impacting state and local taxation.

Learning Objectives: After attending this presentation, the participant will be able to:

- Outline recent court cases and summarize the legal precedents provided
- Discover critical trends developing in the court system, from a procedural and juridical perspective
- Discuss recent and proposed legislation and its impact on the corporate taxpayer.

Registration Policies

Registration is available at www.iptlocalluncheongroup.com or by faxing a registration form to 555-555-5555.

$30 for members
$50 for non-members

CPE/CEC:
Participants can earn 1 CPE credits in Taxation and CMIs will earn 1 hour towards renewing their designation.

Additional Information

Prerequisites: Previous experience in taxation

Advanced Preparation: None

Program Level: Update
Delivery Method: Group-Live

Registration Policies

Refunds and Cancellations:
Requests for refunds must be received in writing by May 19, 2015 and will be subject to a 25% cancellation fee. No refunds will be granted after May 26, 2015.

For more information regarding refund, complaint and/or program cancellation policies, please contact the treasurer at treasurer@iptlocalluncheongroup.com or 555-555-5554.

This program is co-sponsored by the Institute for Professionals in Taxation® solely for NASBA CPE purposes and the ANYNAME Local Luncheon Group.

The Institute for Professionals in Taxation® is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been based on a 50- minute hour.