

# NEW BENEFIT!

## IMCA Now Offers Convenient, Immediate Online Reporting of IMCA-Sponsored Continuing Education (CE) Credits

IMCA is excited to offer CIMA<sup>®</sup>, CIMC<sup>®</sup>, and CPWA<sup>®</sup> designees a convenient and immediate method for submitting IMCA-sponsored CE from IMCA conferences. You may report your CE from this conference in five simple steps:

- 1) Visit [www.IMCA.org/main/do/SubmitCE](http://www.IMCA.org/main/do/SubmitCE) and log in to your “My IMCA” account.
- 2) Click the “Report CE” link
- 3) Select the sessions you attended while at the conference
- 4) Review the summary of total CE hours, make adjustments if necessary, then click the “Submit CE” button
- 5) Visit the “CIMA, CIMC, or CPWA Details” area of your “My IMCA” account to ensure that proper CE credit was awarded.

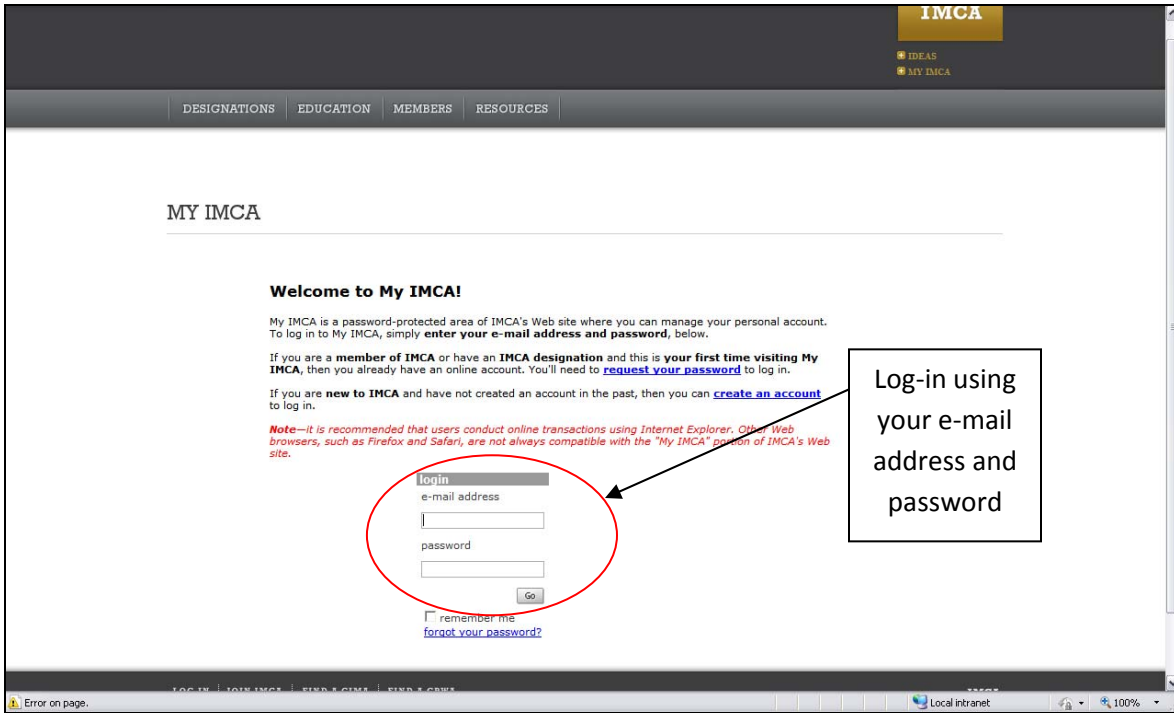
*For more detailed instructions, including screenshots, please refer to the next three pages.*

### **IMPORTANT NOTICES:**

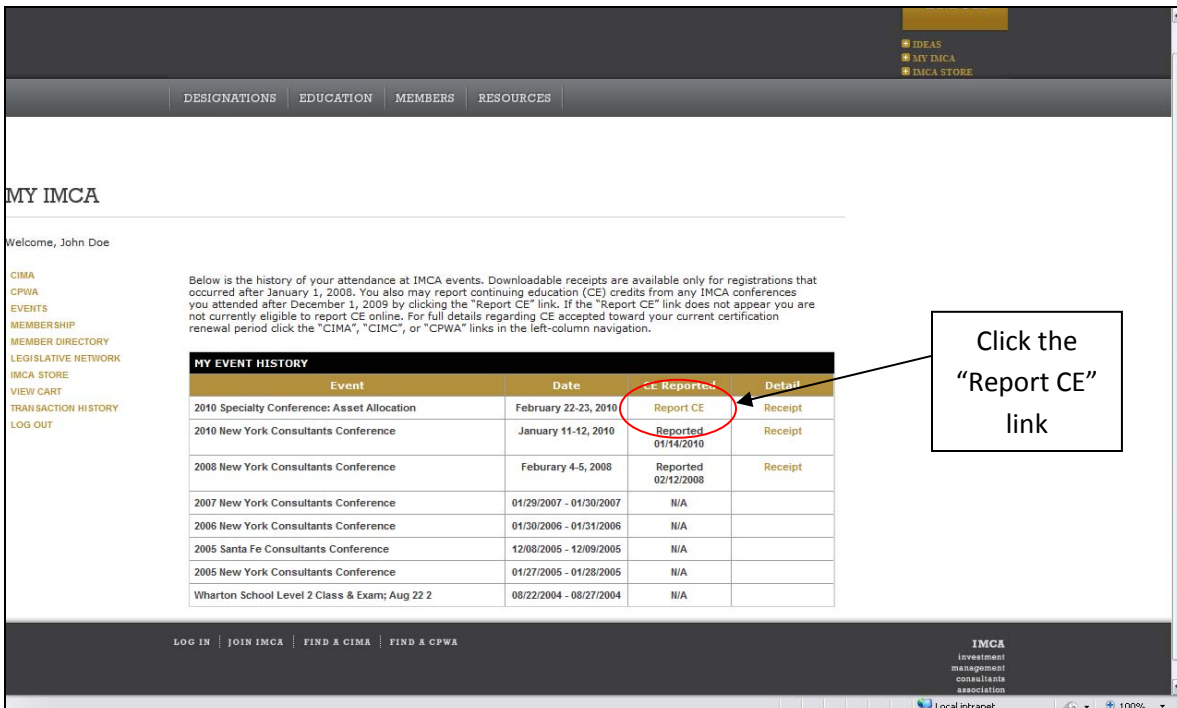
- Online CE reporting for IMCA conferences will be available on the first day **after** the conference concludes.
- Should you choose to report CE online, you **DO NOT** need to fax in your hardcopy CE form to IMCA’s office. However, if you do not choose to report CE online, you **MUST** fax in your hardcopy CE form (located in your conference binder) in order to ensure proper CE credit is applied to your account.
- IMCA designees can only submit CE online for CIMA, CIMC, and CPWA designations. If you do not hold an IMCA designation, you will not be able to report CE online.
- Carefully select **ONLY** the conference sessions you attended **IN FULL**. For example, if you did not register for and attend the post-conference extended session, **DO NOT** select that session when reporting CE online. IMCA will audit each online CE submission for accuracy.
- Once you have submitted your CE online, you cannot make any edits or changes.
- Should you have any questions, concerns, or feedback regarding online CE reporting, please contact Jill Scott at IMCA, 303.850.3070 or [jscott@imca.org](mailto:jscott@imca.org).

## Detailed Instructions for Reporting IMCA-Sponsored CE Online

**STEP 1**—Once you enter [www.IMCA.org/main/do/SubmitCE](http://www.IMCA.org/main/do/SubmitCE) into your Web browser, you will be prompted to log in to your “My IMCA” account. Your log-in user name is your e-mail address, and if you have forgotten your password you can simply click the “request your password” link for instructions on re-setting your password.



**STEP 2**—Once you have successfully logged in, you will find yourself in the “Event History” section of your “My IMCA” account. You may report CE for any eligible events by clicking the “Report CE” link. If the “Report CE” link does not appear you are not currently eligible to report CE online. **NOTE**—the “Report CE” link will not appear until the day after the conference concludes.



**STEP 3**—To ensure that proper CE credit is awarded, **carefully select ONLY the sessions that you attended IN FULL from the list of conference sessions.** The sessions are listed chronologically by time and date, and you can see which session(s) qualify for ethics and CPWA curriculum core topic hours using the columns. Once you have selected all of the sessions you attended, click the “Submit for Review” button.

MY IMCA

Welcome, John Doe

CIMA  
CPWA  
EVENTS  
MEMBERSHIP  
MEMBER DIRECTORY  
LEGISLATIVE NETWORK  
IMCA STORE  
VIEW CART  
TRANSACTION HISTORY  
LOG OUT

To ensure proper continuing education (CE) credit is awarded, carefully select ONLY the sessions that you attended IN FULL.

2010 SPECIALTY CONFERENCE: ASSET ALLOCATION					
	Time	Session Title	IMCA Hours	Ethics Hours	Core Topic Hours
<b>Monday February 22</b>					
	8:15AM				
<input checked="" type="checkbox"/>	8:15AM - 9:15AM	General Session 1: The Myth of the Rational Market	1.00	0.00	0.00
9:25AM					
<input checked="" type="checkbox"/>	9:25AM - 10:40AM	Workshop #1: Sustainable Investing	1.50	0.00	1.50
<input type="checkbox"/>	9:25AM - 10:40AM	Workshop #2: Balancing Risks in Retirement: Volatility versus Longevity	1.50	0.00	1.50
11:10AM					
<input type="checkbox"/>	11:10AM - 12:00PM	Workshop #3: How Much Real Estate is There in a REIT?	1.00	0.00	1.00
<input type="checkbox"/>	11:10AM - 12:00PM	Workshop #4: Ironman Advisor: Energy for Performance	1.00	0.00	0.00
1:00PM					
<input type="checkbox"/>	1:00PM - 2:15PM	General Session #2: The New Normal fo Asset Allocation Isn't that Normal At All	1.50	0.00	0.00
2:25PM					
<input type="checkbox"/>	2:25PM - 3:15PM	Workshop #5: Allocating to Asia	1.00	0.00	0.00

Done Local Intranet 100%

**STEP 4**—After clicking “Submit for Review,” you will be presented with a summary of your selections. **Carefully verify that your selections are accurate,** and utilize the “Back” button should you need to make any adjustments. If the total number of CE hours in the IMCA, ethics, and CPWA Core Topic (if relevant) columns are accurate, you must attest that the CE hours you are submitting are valid and that you have disclosed any relevant complaints or disciplinary actions to IMCA by clicking the appropriate box. **Once you have agreed to the attestation and submitted your CE to IMCA with the “Submit CE” button, you cannot make any changes.**

	2:25PM - 3:15PM	Workshop #6: Lifetime Financial Advice: Human Capital, Asset Allocation and Insurance	1.00	0.00	1.00
	3:40PM - 4:30PM	General Session #3: Factors for Success - Endowment Asset Allocation Models and What has Changed	1.00	0.00	0.00
	4:30PM - 5:30PM	General Session #4: Buy and Hold is Dead (Again)	1.00	0.00	0.00
<b>Tuesday February 23</b>					
	9:00AM - 9:50AM	General Session #5: Investing in the "New Normal"	1.00	0.00	0.00
	9:00AM - 10:15AM	General Session #6: Global Asset Allocation	1.50	0.00	0.00
	10:40AM - 11:30AM	General Session #7: Contrarian Strategies for Building Investor Wealth	1.00	0.00	1.00
	11:40AM - 12:30PM	General Session #8: Ethics and the Emerging Profession of Management	1.00	1.00	0.00
<b>Total Hours: 12.5</b>			<b>12.50</b>	<b>1.00</b>	<b>4.50</b>

I attest that the CE hours I am reporting as summarized on this page are accurate and valid. Furthermore, I attest that I have not been involved in any complaints or criminal, civil, self-regulatory organization or government disciplinary actions in the past two years.

If you are unable to comply with this statement please click the "Cancel" button and submit a written summary of the incident(s) to IMCA. If you previously disclosed the incident(s) to IMCA via your CIMA/CIMC/CPWA application or Certification Renewal Form and Invoice, you may check the box.

Submit CE Back Cancel

Done Local Intranet 100%

**STEP 5**—After submitting your CE you will automatically be returned to the “Event History” section of your “My IMCA” account, and you will see that the “Report CE” link has been replaced with the date on which the CE was submitted. You can verify that your CE was recorded by visiting your CIMA, CIMC, or CPWA Details page. Use the navigation in the left-hand column to review your full CE details. E.g. if you hold the CIMA certification, click the “CIMA” link in the left-column navigation.

DESIGNATIONS | EDUCATION | MEMBERS | RESOURCES

MY IMCA

Welcome, John Doe

Below is the history of your attendance at IMCA events. Downloadable receipts are available only for registrations that occurred after January 1, 2008. You also may report continuing education (CE) credits from any IMCA conferences you attended after December 1, 2009 by clicking the "Report CE" link. If the "Report CE" link does not appear you are not currently eligible to report CE online. For full details regarding CE accepted toward your current certification renewal period click the "CIMA", "CIMC", or "CPWA" links in the left-column navigation.

Event	Date	CE Reported	Detail
2010 Specialty Conference: Asset Allocation	February 22-23, 2010	Reported 02/10/2010	Receipt
2010 New York Consultants Conference	January 11-12, 2010	Reported 01/14/2010	Receipt
2008 New York Consultants Conference	February 4-5, 2008	Reported 02/12/2008	Receipt
2007 New York Consultants Conference	01/29/2007 - 01/30/2007	N/A	
2006 New York Consultants Conference	01/30/2006 - 01/31/2006	N/A	
2005 Santa Fe Consultants Conference	12/08/2005 - 12/09/2005	N/A	
2005 New York Consultants Conference	01/27/2005 - 01/28/2005	N/A	
Wharton School Level 2 Class & Exam; Aug 22	08/22/2004 - 08/27/2004	N/A	

LOG IN | JOIN IMCA | FIND A CIMA | FIND A CPWA

IMCA  
Investment  
management  
consultants  
association

You'll note the date that you submitted your CE, and you can review the details by clicking on the appropriate link: CIMA, CIMC, and/or CPWA

Within the designation (CIMA, CIMC, CPWA) details area of your “My IMCA” account, you can verify that your CE record was updated correctly. You also can determine how many hours you still owe to meet the CE portion of your certification renewal requirements. Click the “Print CE Summary” link for a high-level summary of your CE, or use the “+” drop-down option (view only) for complete session details for the CE you just submitted. Should you have any questions, concerns, or feedback regarding online CE reporting, **please contact Jill Scott at IMCA, 303.850.3070 or [jscott@imca.org](mailto:jscott@imca.org)**.

Welcome, John Doe

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**CIMA RECERTIFICATION PERIOD**

Status: Certified      Start Date: 09/01/2008      End Date: 08/31/2010

**CONTINUING EDUCATION REQUIREMENTS**

You must accumulate 40 hours of continuing education (CE) credit every two years in order to maintain the CIMA certification. You can see your specific requirements, as well as the full details regarding your reported CE, below. For a printable summary of your reported CE, [click here](#). If you are within 90 days of your certification renewal period end date, you may download, print, sign, and submit the Certification Renewal Application Form and Invoice by clicking on the appropriate link, above. If no link appears you are not yet eligible to remit your designation renewal fee. NOTE—when printing your Certification Renewal Application Form and Invoice, please set your printer settings to "portrait", as the form **must be submitted to IMCA on one complete page**.

- Must have a **MINIMUM of 20 hours of IMCA-sponsored CE credit**.  
You currently have **25.00** hours of IMCA-sponsored CE credit. You need at least **0.00** more hours of IMCA-sponsored CE credit to satisfy your total CE requirement.  
*(Only the first 20 hours of non-IMCA-sponsored CE credits you report count toward your renewal requirement.)*
- Must have a **MINIMUM of 2 hours of ethics CE credits**.  
You currently have **2.00** hours of ethics CE credit. You need at least **0.00** more hours of ethics CE credit to satisfy your total CE requirement.
- Must have a **MINIMUM of 40 hours of total CE credits**.  
You currently have **25.00** total hours of CE credit. You need at least **15.00** more hours of CE credit to satisfy your total CE requirement.

For more information on **CIMA certification renewal requirements**, [click here](#).  
For more information on how to **submit your CE credit hours**, [click here](#).

**CE REPORTED**

Program Date	Provider	Program	CE Type	Total	IMCA	Ethics
02/07/2010	IMCA	2010 Specialty Conference: Asset Allocation	IMCA	12.50	12.50	1.00
01/11/2010	IMCA	2010 New York Consultants Conference	IMCA	12.50	12.50	1.00
TOTALS				25.00	25.00	2.00

Print CE Summary +

Print a CE summary for your records, or view full session details by clicking the “+” sign