

## How to Get Your Continuing Education Credit at the 60<sup>th</sup> Annual NAEPC Advanced Estate Planning Strategies Conference

*Please read this document thoroughly and keep a copy for your records.*

### Types of Credit Available ·

accounting	CFP®	legal
banking (CTFA)	AEP®	PACE

### Important Notes ·

- *Legal, Accounting, Banking, CFP®, AEP®, and PACE Credit:* You will receive credit for every CE presentation you attend.
- NAEPC works with the Society of FSP to administer credit for the Annual Conference and with ConferenceAdit for online tracking of credit.



### Schedule of Continuing Education Sessions ·

Monday · 8:00 am - 5:00 pm

Tuesday · 8:00 am - 5:00 pm

Wednesday · 8:10 am - 12:25 pm

### Frequently Asked Questions ·

How do I register to receive credit? There are two ways to register to receive credit 1) paperless online tracking, which is recommended, or 2) paper form tracking. Learn more about each on the next page of this document.

Do I need to do anything in advance of arriving at the conference? Yes, pre-registration is requested. Instructions are found on the next page.

What should I do if I need help during the conference? Please visit the Continuing Education / ConferenceAdit helpdesk immediately to have your questions answered.

How much credit can I possibly get at this meeting? You can earn up to 16 hours of credit (in-person) or up to 12 hours of credit (virtual), depending on what type of credit you are requesting (example: legal, accounting), your home state and how many sessions you attend. You can monitor approval status by clicking [HERE](#).

I am using paper form tracking - where do i get my form? You will receive a form when you enter the room for the first CE session of each day and will return it to a staff member at the end of each day. There is one form per day.

What if I can't go to every session? You can earn partial credit. Credit is issued based on actual attendance.

What if I forget to get my paper form stamped when I leave the session or forget to sign out using the online pin – can I get it stamped or check out later that day or the next day? No. You must have your form stamped as you leave the session. The staff will make every effort to make sure you get stamped, but it is your responsibility to remember to take your form to get stamped before and after each CE session or to check out with the pin.

How soon will I get my certificates? Your CE certificates will be emailed within approximately 30 days of the conclusion of the program to the email address you provide on your attendance form or at the time of conference registration. Credits will be reported to the appropriate jurisdiction before the certificates are emailed to you. The certificate will be emailed from [certificates@advisoradit.com](mailto:certificates@advisoradit.com). Paper copies will not be mailed.

NAEPC assumes no responsibility for attendees who fail to properly track and/or report their attendance for the event.  
Direct questions to the Continuing Education / ConferenceAdit help desk **during the conference**.

## Pre-Conference and On-Site Instructions for Continuing Education Credit ·

### Pre-Conference Preparation for All Attendees ·

Regardless of the tracking method you choose, all attendees must register prior to the first session. To do so:

- 1) Visit [conferenceadit.com/NAEPC](http://conferenceadit.com/NAEPC) using pin 111323.
- 2) Under the “Courses” tab, enroll for CE by adding the email address and zip code used to register for the conference.
- 3) Click on the “Profile” icon in the top right corner and review the information for accuracy.
- 4) If you need to add or update your IDs, go to “Your Designations” and click “Edit”
- 5) Select the designations or degrees that apply to you, verify the ID numbers provided at the time of registration or enter your ID numbers for each designation or discipline as instructed, and click “Save”
  - ✓ For legal credit, please include the 2-letter state abbreviation in front of your National Producer Number (NPN) or identification number (Example: NY1234567). If you have multiple states, simply separate each entry by a comma (Example: NY1234567, NJ1234567)

*Note that credit cannot be granted if this step is overlooked.*

### On-Site Tracking Option #1 · Online by ConferenceAdit



**During the Conference:** Attendees must:

- 1) Have completed the pre-conference instructions above.
- 2) Use a mobile phone, tablet, or laptop to visit [conferenceadit.com/NAEPC](http://conferenceadit.com/NAEPC).
- 3) Under the “Courses” tab, enter your email address and zip code.

For **Each Session** during the conference you **MUST**:

- 1) Under the “Courses” tab, find the name of the session.
- 2) Check-in at the beginning of the session by selecting the **Green** button and following the instructions to complete the check-in process.
- 3) Check-out at the conclusion of the course using the PIN provided on the CE Pin sign or by the speaker or the person who offers the session’s closing remarks. If you have navigated away from the initial check-in process, you can go back to the Courses tab and select the now **Red** button to check-out.
- 4) Press the “Submit” button to record your attendance and affirm that “I have attended the course in its entirety to receive the CE credit specified by this course” and submit.

- You must check in and out for EACH SESSION.
- You must check out for each session immediately at its conclusion.
- The ability to check in and out of sessions will be disabled 10 minutes after the program ends.
- Meeting rooms will be monitored.



NAEPC assumes no responsibility for attendees who fail to properly track and/or report their attendance for the event. Direct questions to the Continuing Education / ConferenceAdit help desk **during the conference**.

## On-Site Option #2 · Paper Form

Please ensure that you have completed the pre-registration as noted above. You will be handed a Proof of Attendance Form as you enter the room at the beginning of the program for each day. It will be stamped IN. Complete the form - it must have your signature on it. Have your form stamped OUT at each break and bring it with you to the next session to be stamped IN. When the day is over, your form will be stamped OUT and collected. Keep the bottom portion until you receive your certificate(s) via email.

- **You will not be stamped IN if you arrive 10 minutes after the program begins.**
- We will be stamped OUT only when the program is over. Q&A is part of the CE program and there is no CE credit if you leave early.
- Do not leave until you are stamped out. If you leave and do not have your form stamped out, you will not receive credit for that session.
- If you do not have a required license number, hand in your form anyway. You should FAX the missing information to: Society of FSP Accreditation Dept. 610-359-8115 immediately after the program (the FAX number is also on the bottom of the form which you keep). If your license number is not received by your state's required deadline, your attendance cannot be reported.
- Do not keep the top of the form. FSP must have the original forms to process your credit.
- Meeting rooms will be monitored.



## Important Note about Attendance Tracking ·

Tracking is required for those who wish to receive continuing education credit. NAEPC cannot issue a certificate of completion or course number to those who have not tracked their session attendance on-site. Please visit with a conference CE Proctor if you have any questions about attendance tracking or the requirements to receive continuing education credit.