

## How to Get Your Continuing Education Credit Credits

Credits available: Insurance, CFP®, Legal, Accounting, Banking (CTFA), AEP®, PACE

**Please read this entire document prior to attending the first session of the conference.**

**Insurance Credit:** In order to earn ANY insurance credit, you must attend every CE session both days. There is no partial credit for insurance. If you miss one session, you will not receive any insurance credit.

**Legal, CFP®, Accounting, Banking, AEP®, PACE Credit:** You will receive credit for every CE presentation you attend. Check off the appropriate box(es) on your Proof of Attendance form and enter your license numbers.

### CE Sessions are scheduled on:

Thursday, November 16, 2017 from 8:15 am -5:00 pm & Friday, November 17, 2017 from 8:15 am - 4:45 pm

### Procedure for Your CE Proof of Attendance Form

You will be handed a Proof of Attendance form as you enter the room at the beginning of the program. 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. Use the same form for the Friday sessions. When the program is over, your form will be stamped OUT and collected. **Keep the bottom portion until you receive your certificate(s), which will only be sent via email.** Your certificate will come from:

*Sender:* NetStudy Processing

*Subject line:* Your NAEPC Conference Certificate of Completion (on behalf of Society of Financial Service Professionals)

### Other Important Notes

- **You will not be stamped IN if you arrive 10 minutes after the program begins.**
- We will stamp OUT only when the program is over. Q&A is part of the CE program. 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 or the rest of the program if you need insurance credit.
- 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.

### Frequently Asked Questions about CE Credit at this Conference

- How much credit can I possibly get at this meeting? You can earn up to 14 hours of credit, depending on what type of credit you are requesting (example: insurance, legal, accounting), your home state and how many sessions you attend.
- Where do I get my Proof of Attendance form? You will receive a form when you enter the room Thursday for the first CE session.
- What if I can't go to every session? **If you need insurance credit, you will not be able to get any credit for the entire program – there is no partial credit.** You can earn partial credit for all the other disciplines.
- What if I forget to get my form stamped when I leave the session – can I get it stamped 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.
- How soon will I get my certificates? Your CE certificates will be emailed to the email address you provide on your attendance form. Credits will be reported to the appropriate jurisdiction before the certificates are emailed to you.

**Important Notice:** If you live in **South Carolina or Virginia**, you must read your state's notice which is below (for insurance credit only) and check the gray box on your Proof of Attendance form.

## **SOUTH CAROLINA**

In accordance with recently adopted changes to South Carolina Code of Regulations 69.50 VI. (D), all Continuing Education (CE) sponsors or instructors are required to provide a copy of this reminder notice to each attendee of a classroom course. The Regulation also requires all correspondence course sponsors to include this notice in all continuing education course material (12 pt. Font Bold). Note: course sponsors must maintain in their records for at least three years certification that a copy of this notice was distributed to each producer subscribing to their respective course.

- Effective January 2011, the deadline for biennially complying with continuing education and license renewal is the last day of the producer's month of birth. Producers born in an odd numbered year must comply by the last day of the birth month in an odd numbered year. Producers born in an even numbered year must comply by the last day of the birth month in an even numbered year.
- Producers must renew the license, complete 24 hours of continuing education including a minimum of 3 hours of Ethics, and pay the biennial recordkeeping fee to the Continuing Education Administrator by the deadline or the producer license will lapse.
- Multi-line (property and casualty and life, accident and health) producers must complete twenty-four hours of CE credits. A minimum of eight (8) credit hours must be completed in each line of authority and a minimum of three (3) credit hours of Ethics.
- Producers with reduced compliance requirements (15 hours) must complete 12 hours in the line of authority held and 3 hours of Ethics. Multi-line producers with reduced compliance requirements (15 hours) must complete 6 hours in each line of authority and 3 hours of ethics. Failure to comply by the last day of the producer's birth month will result in the license being lapsed.
- Up to 18 CE hours in excess of the CE compliance period may be carried over and applied to the next compliance period. (The law allowing reduced CE compliance was repealed January 1, 2010. This Section applies only to those producers who were granted a reduced CE compliance prior to January 1, 2010.)
- An individual who arrives after the start of a CE class or leaves before the class is over will not receive credit for the continuing education classroom session, regardless of the number of hours completed during the class session. Instructors may deny credit to anyone who is inattentive (reading the newspaper, talking, texting, using cell phone, etc.).

All licensed resident insurance producers should first check the approved continuing education course list on Prometric's website ([www.prometric.com/southcarolina](http://www.prometric.com/southcarolina)) or contact Prometric at 800-490-6551 before taking a CE course. Courses taken from an unapproved sponsor or instructor will be declined.

**Licensed insurance producers can check their continuing education status by calling Prometric at 1-800-490-6551, or by checking their transcript at Prometric's website: <http://www.prometric.com/CE/scceprod>**

## **VIRGINIA**

**IT IS YOUR RESPONSIBILITY TO BE CE COMPLIANT, INCLUDING PAYMENT OF ALL FEES. IF YOU CHOOSE TO DELEGATE RESPONSIBILITY FOR KEEPING TRACK OF AND/OR ENSURING YOUR CE COMPLIANCE TO ANOTHER PERSON (SUCH AS AN AGENCY MANAGER, SECRETARY, LICENSING CLERK, COMPLIANCE OFFICER, FELLOW AGENT, FAMILY MEMBER, OR OTHER THIRD PARTY), THE ULTIMATE RESPONSIBILITY FOR NONCOMPLIANCE, AND ANY RESULTING PENALTIES, WILL CONTINUE TO BE YOURS.**

1. This course is categorized as [Company/Agency] / [Non-Company/Non-Agency] (highlight the relevant type). No more than 75 percent of your required credits can come from Company/Agency course credits (see inside front cover of handbook). Additionally, at least three (3) course credits must be earned for Ethics (Law and Regulations).
2. Classroom courses - One credit hour is 50 minutes of continuous instruction or participation. Your attendance will be verified via the sign-in/sign-out sheet located with the door monitor. Only students meeting minimum attendance requirements may receive certificates of course completion.
3. Agents cannot receive CE credit for a course taught in alternative formats (a classroom course, online course, video or audio conference, web-conference-based, etc.) if the curriculum is based on the same published materials; this rule applies to any variation of course type. For example, Agents cannot receive CE credit for both a self-study (examination course) and a classroom course based on the same published materials.
4. Excess earned Ethics credits may be applied to cover other CE requirements in the current biennium and any remaining credits may be carried over to the next biennium and applied to either the Ethics requirement or other CE requirement.
5. Agents are not allowed to receive or carry over credit for the same course in the same biennium.
6. ONLY the Virginia Insurance License Number (VLN) or the National Producer Number (NPN) is permitted for identification. Please be sure that you have recorded your number so that the instructor can read it, as illegible submissions will result in a delay of reporting course credits.
7. This class may be audited by representatives of Pearson VUE. Pearson VUE is a private company who in partnership with Vertafore was contracted by the Virginia Insurance Continuing Education Board to administer all facets of the continuing education program for the Board effective with the 2009-2010 biennium.
8. CE credits for this course should be posted to your transcript within 20 calendar days. If your transcript does not reflect this course within 20 calendar days, please contact the provider.
9. Agents are expected to give their full attention to this class. All electronic devices should be turned off and put away along with any reading material other than material applicable to this class.
10. Agents and consultants who fail to update their address with the Virginia Bureau of Insurance may not receive important notices. Agents may update their address and add or update their email address online at [ww.scc.virginia.gov/boi/online.aspx](http://ww.scc.virginia.gov/boi/online.aspx).
11. Agents who are newly licensed in the second year of a biennium are exempt from the continuing education requirements for that biennium. These agents may elect to take continuing education courses and earn credits that may be carried over to the next biennium provided they pay the \$20 continuance for the current biennium. Failure to pay this continuance fee will prevent the credits earned from being carried over to the next biennium when the agent will be required to meet all continuing education requirements.