

NAME: _____ Month/Day of Birth: ____/____

Organization: _____

Email address: _____ Tel# _____

Attaining this designation will help fulfill your career and give your financial organization’s IRA owners the peace of mind that comes from working with a professional IRA representative. This six week course provides attendees with a solid foundation of IRA knowledge through a combination of interactive weekly webinars and eLearning modules.

After the “Getting Started” kickoff webinar, each week consists of a self-paced eLearning module (45 minutes to 1 hour) followed by a 90 minute interactive webinar to help participants apply their knowledge from the eLearning modules. After completing, IRA University, attendees have the opportunity to earn their Certified IRA Specialist I (CIS 1) designation for no additional cost.

REQUIRED COURSES:

| GRADE | DATE COMPLETED | COURSE | DELIVERY OPTIONS | | | | |
|-------|----------------|--------------------|------------------|---|----|-----|----|
| | | | L | W | SP | ILO | GL |
| | | IRA University | | | | ● | |
| | | Certification Exam | | | ● | | |

L= Live W=CFTEA Webcourse SP= Self-paced Online ILO = Instructor-Led Online GL = Guided Learning

PLEASE CONTACT THE CFTEA OFFICE FOR CONFIRMATION OF COMPLETION WHEN APPROACHING COMPLETION OF A CERTIFICATE OR DIPLOMA