

NAMA

NATIONAL ASSOCIATION OF MUNICIPAL ADVISORS

**2017 ANNUAL CONFERENCE
SCOTTSDALE**

UPDATES TO CIPMA PROGRAM

Co-Chairs

**NAMA's Committee on
Standards, Ethics and
Education**

Mike Harrigan, Ehlers

Leo Karwejna, PFM

CHANGES TO NAMA CIPMA PROGRAM

- S.E.E. Committee Process:
 - Brian Colton, Doug Dove, Chris Hogan, Joe Murray, Lori Raineri, Jeff Smith, Leo Karwejna, Mike Harrigan
 - Membership survey conducted, Committee met twice and submitted Recommendations to Board
 - Board Deliberated and approved changes at its August meeting
- Changes Program from a Test Based to an Education Based Certification Program
 - No Exam going forward
 - Focus on Continuing Education (CE) and Ethics
 - Annual ongoing CE requirement– 12 Hours

CHANGES TO NAMA CIPMA PROGRAM

- Initial Eligibility
 - Must have worked for member firm for 2 years.
 - Bachelor's degree or be engaged in the profession for 6 years.
 - Complete 12 hours of CIPMA training.
 - Agree to abide by Firm's code of ethics or NAMA code (if no firm code exists).
 - Existing CIPMA's will be able to retain certification until December 31 of 2018.
 - In 2018 existing CIPMA's will need to have completed 12 hours of CE.
 - Annual Certification Documentation will be Due in January of Each Year (First year– January, 2019).

CHANGES TO NAMA CIPMA PROGRAM

- Educational Parameters Must Meet CIPMA Standards
 - Intent is to provide a program that enhances or exceeds Series 50 CE requirements.
 - Qualifying Activities for CE Units are set forth in NAMA CIPMA Program Description.
- Annual Reporting Requirements
 - CIPMA Designees must complete CIPMA Continuing Education and Code of Ethics and Conduct form.
 - No self reporting- must be signed by firm's NAMA representative.
 - Subject to review by Executive Director.
- Fees to cover administrative costs
 - \$75 Initial
 - \$50 Ongoing
- See Full Program Information in Attendee Packet and Web site