How to Get Your Continuing Education Credit

NAEPC works with the National Association of Insurance and Financial Advisors (NAIFA) to administer credit for the Annual Conference and with ConferenceAdit for online tracking of credit.

Types of Credit Available (follow the procedures outlined below to receive credit for every CE presentation you attend)**:** AEP® CLE CPE CFP® CTFA EA PRP (formerly PACE)

Schedule of CE Sessions:
Monday 8:30 am - 5:00 pm
Tuesday 8:25 am - 5:30 pm
Wednesday 8:10 am - 12:25 pm

You must register online prior to your first session.

Contact info@conferenceadit.com for questions or issues accessing the online portal.

1. Visit events.conferenceadit.com/NAEPC24 using pin 102124.
2. Under the "Courses" tab, add 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.

To add or update your IDs:
1. Under your profile, go to "Your Designations" and click "Edit".
2. Select the designations or degrees that apply to you.
3. Verify the ID numbers or enter your ID numbers for each designation or discipline as instructed.
4. Click "Save".

For legal credit, include the two-letter state abbreviation in front of your Bar Number, License Number, or identification number (example: NY1234567). If you have multiple states, simply separate each entry by a comma (example: NY1234567, NJ1234567)

Important Note about Attendance Tracking: Tracking is required for those who wish to receive CE credit. NAEPC cannot issue a certificate of completion or course number to those who have not tracked their session attendance on-site. Please visit the CE Help Desk if you have any questions about attendance tracking or the requirements to receive CE credit.

Advanced
Estate Planning Strategies
Conference

LEADERS in
the **ESTATE**
PLANNING
COMMUNITY.

Online by ConferenceAdit

RECOMMENDED ✓

Contact info@conferenceadit.com for questions or issues accessing the online portal.

Before the Start of Your First Session Attendees Must:

1. Visit events.conferenceadit.com/NAEPC24 using pin 102124.
2. Under the "Courses" tab, add 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.

For Each Session During the Conference Attendees Must:

1. Under the "Courses" tab, find the name of the session you are attending.
2. Select the Green button and follow the instructions to complete the check in process.
3. At the conclusion of the session, check out using the PIN on the CE Pin sign in the session space. If you have navigated away from the initial check in process, go back to the "Courses" tab and select the now Red button to check out.
4. Press the "Submit" button.

Please Note: 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.

Paper Form Instructions

Before the Start of Your First Session Attendees Must:

1. Visit events.conferenceadit.com/NAEPC24 using pin 102124.
2. Under the "Courses" tab, add 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.

For Each Session During the Conference Attendees Must:

1. Pick up a Proof of Attendance Form as you enter the session room at the beginning of each day.
2. Complete the form - it **must have your signature** on it.
3. Have your form stamped IN and OUT for each session (for back-to-back sessions get an IN stamp at the beginning of the first session and an OUT stamp at the end of the last session).
4. Turn in your form, at the end of each day. Keep the bottom portion until you receive your certificate(s) via email.

Please Note:

- You will not be stamped IN if you arrive 10 minutes after the session begins.
- You will be stamped OUT only when the session is over. Q&A is part of the CE session and you will not receive 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. Please email your license number to cevans@naifa.org. This email address is also at the bottom portion of your form. If your license number is not received by your state's deadline, your attendance cannot be reported.
- Do not keep the top portion of your form. NAIFA must have the original form(s) to process your credit.
- Meeting rooms will be monitored.

NAEPC assumes no responsibility for attendees who fail to properly track and/or report their attendance for the event.
Please visit the CE Help Desk if you have any questions.

National Association of Estate Planners & Councils
COLLABORATE · EDUCATE · CULTIVATE

How do I register to receive credit?
1. Paperless online tracking (recommended)
2. Paper form tracking
   * Learn more about each on the previous page of this document.

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

What should I do if I need help during the conference?
Visit the Continuing Education Help Desk to have your questions answered.

How much credit can I get at this conference?
You can earn up to 16 hours of credit, depending on what type of credit you are requesting (example: legal, accounting), your home state and how many sessions you attend.

I am using paper form tracking - where do I get my form?
You will receive a form when you enter the session room for the first CE session of each day and will return the form 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 check in to a session or forget to check out of a session using the online portal - can I check in and/or out later that day or the next day?
No. You must check in to each session and check out of each session using the pin provided. If you forget to do one of these steps see the Continuing Education Help Desk **immediately**.

What if I forget to get my paper form stamped when I leave a session - can I get it stamped later that day or the next day?
No. You must have your form stamped as you leave each session. The staff will make every effort to make sure you get your form stamped, but it is your responsibility to remember to take your form to get stamped before and after each session (back-to-back sessions will be stamped in at the beginning of the first session and out at the end of the second session).

How soon will I get my certificate(s)?
Your CE certificate(s) 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 your conference registration. Credits will be reported to the appropriate jurisdiction before the certificate(s) are emailed to you.
The certificate(s) will be emailed from certificates@advisoradit.com. Paper copies will not be mailed.

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