



## Your NACVA Tri-Annual Recertification is Due in 2021

**Compliance Date: December 31, 2021**

**Plan Ahead!**



### Your CPE Reporting Cycle

CPE must be earned in the years 2019, 2020, and/or 2021. All credentialed designees must comply with tri-annual recertification policies by December 31 of their reporting cycle. This period starts with the first full calendar year after receiving the designation and in three-year cycles thereafter. For example, if the designee certified in July 2018, the recertification requirements must be completed by December 31, 2021, the compliance due date. Using the example above, the next compliance due date would be December 31, 2024. Credential designees who do not comply will be placed on Inactive status. See page 3 for details. **Tri-annual recertification compliance** has been streamlined, making the process **easy to complete** relative to your **specific area(s) of practice**, while also making it **flexible** for you to meet the 60-point/60 CPE-hour (1 point=1 hour of CPE) requirement by December 31, 2021. Tri-annual recertification compliance also requires a \$300 recertification fee, which can be waived by taking **Recommended CPE Bonus Point Programs**.

### Your CPE Reporting Cycle

CPE earned from programs between January 1, 2019 and December 31, 2021 relating to business valuation, financial litigation/financial forensics, forensic accounting, financial statement analysis, gift and estate planning, professional standards, exit planning, accounting, economics, tax, audit, M&A, fraud, transaction advisory services, healthcare valuation, and ethics qualify towards recertification.

NACVA's governing boards and training faculty have identified NACVA/CTI courses—**Recommended CPE Bonus Point Programs**—that reinforce core business valuation and financial litigation theory, methodologies, and practice. These programs will keep you well-rounded in the

performance of business valuation and financial litigation services, increase your awareness of industry developments, and provide practitioner-centric training keeping you alerted to issues that lead to, or contribute to, the quality of your work product. These programs are conveniently offered through live classroom, live online, online/on-demand, and self-study throughout the year.

**IMPORTANT NOTE: IBA Recertification Policies Are Ceased**—The MCBA and CBA were credentials of the Institute of Business Appraisers™ (IBA™). In 2016, the IBA was dissolved and merged into NACVA. IBA recertification policies remained intact through year-end 2018 to allow a transition period for MCBA and CBA credential holders to comply with

NACVA's tri-annual recertification policies described herein. Effective January 1, 2019, IBA recertification policies ceased and, as such, MCBA and CBA credential holders must comply with NACVA's tri-annual recertification policies.

To guarantee you get the most out of your membership and certification between now and your next tri-annual recertification compliance cycle in 2024, please **review the details discussed herein** and **select one of the Recertification Options** that work for you. If you have questions, or would like support from our Member/Client Services team, call us toll free at (800) 677-2009. You can also visit **[www.NACVA.com/Recertification](http://www.NACVA.com/Recertification)** for additional details.

# Option 1

## Reinforce Your Core Knowledge

### —Recommended CPE Bonus Point Programs

No Recertification Fee!

Recertifying through this option requires attendance to two **Recommended CPE Bonus Point Programs**. For these two programs, you will receive 12 bonus points each (24 points maximum) that count towards the 60-point requirement. Each program also waives \$150 off the fee, thus completely waiving your \$300 tri-annual recertification fee. **Note:** The AVW International program does not waive \$150 off the annual recertification fee and only awards bonus points. Bonus points for these courses are only awarded once in a tri-annual recertification compliance cycle. However, if the courses are taken more than once in a cycle, the CPE awarded each time is included.

To achieve the remaining 36-points, our Member/Client Services team can also work with you to build a CPE training bundle from NACVA/CTI programs specific to your interests. Actual CPE hours taken must be 36 hours or more, but can include the CPE hours you receive on the Bonus Point Programs.

**Fulfill your 60-point/60 CPE-hour (1 point=1 hour of CPE) requirement by December 31, 2021, through this option and you will:**

- Reinforce core theory, methodologies, approaches, professional standards, and currently trending issues.
- Earn 24 bonus points towards the 60-point requirement. Bonus points for these courses are only awarded once in a tri-annual recertification compliance cycle.
- Waive the \$300 tri-annual recertification fee.
- **You will only need to attest to adhering to NACVA's Professional Conduct policies.**
- View your NACVA/CTI CPE by logging into My Account on **www.NACVA.com**.

Recommended CPE Bonus Point Programs	Actual CPE Hours Earned	Bonus Points Earned	Total Points Earned
<b>Around the Valuation World® Annual Subscription</b> <i>The Definitive Source for Industry News and Updates</i> 12 monthly webcasts and three additional segments, up to 27 hours of CPE Schedule and subscription details at <a href="http://www.AroundtheValuationWorld.com">www.AroundtheValuationWorld.com</a>	Up to 27 (two hours per month, plus three additional one-hour segments throughout the year)	12 (minimum of 12 hours live webcast attendance required)	Up to 39
<b>Around the Valuation World® International Annual Subscription</b> <i>The Definitive Source for Industry News and Updates</i> 12 monthly webcasts, up to 12 hours of CPE Schedule and subscription details at <a href="http://www.NACVA.com/AVWInternational">www.NACVA.com/AVWInternational</a>	Up to 12 (one hour per month)	12 (minimum of 12 hours live webcast attendance required)	Up to 24
<b>Case Analysis in Person (CAP) and Case Analysis by Webinar (CAW)</b> <i>The Profession's First and Only Business Valuation Report Peer Review</i> Live Training/Live Webinar schedule, discounts, and registration fees at <a href="http://www.theCTI.com/CAW">www.theCTI.com/CAW</a>	2	12	14
<b>Current Update in Valuations (CUV)</b> <i>Essential Updates on Recent Valuation Trends, Techniques, and Opinions</i> Live Training/Live Webinar schedule, discounts, and registration fees at <a href="http://www.theCTI.com/CUV">www.theCTI.com/CUV</a>	8	12	20
<b>Industry Standards and Ethics</b> <i>Ensure Your Knowledge and Compliance with the Profession's Standards</i> Live Training/Live Webinar schedule, discounts, and registration fees at <a href="http://www.theCTI.com/ISU">www.theCTI.com/ISU</a>	2	12	14
<b>Litigation Report Writing Workshop</b> <i>Effective Approaches to Writing for Damages Reports and Litigation Matters</i> Live Training/Live Webinar schedule, discounts, and registration fees at <a href="http://www.theCTI.com/LRW">www.theCTI.com/LRW</a>	8	12	20
<b>Report Writing: Review and Analysis</b> <i>Best Practices to Bullet-Proof Your Valuation Reports</i> Live Training/Live Webinar schedule, discounts, and registration fees at <a href="http://www.theCTI.com/RW">www.theCTI.com/RW</a>	10	12	22

## Option 2

Recertification Fee: \$150

### Take One Recommended CPE Bonus Point Program

+ Report 60-points/60 CPE-hours taken between January 1, 2019 and December 31, 2021

Complete and submit the Recertification Reporting Form by December 31, 2021.

[www.NACVA.com/RecertificationForm](http://www.NACVA.com/RecertificationForm)

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## Option 3

Recertification Fee: \$300

### Report 60-points/60 CPE-hours

taken between January 1, 2019 and December 31, 2021

Complete and submit the Recertification Reporting Form by December 31, 2021.

[www.NACVA.com/RecertificationForm](http://www.NACVA.com/RecertificationForm)

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## Option 4

### Elected or Imposed Inactive Status and Emeritus Status for Retiring Credential Designees

#### Elected Inactive Status

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Credential designees who wish to defer recertification compliance and reporting due to extended inactivity in business valuation, financial forensics, litigation consulting, or for other reasons such as unemployment or a medical condition, but do not want to lose their certification, may elect Inactive status for up to five years.

Under this election, an active Affiliate membership is required annually. **Elected Inactive credential designees cannot use his or her NACVA designation in any capacity, i.e., on business cards, curriculum vitae, signed reports, firm/company website, company letterhead, yellow pages, other organization websites, social media (LinkedIn, Facebook, etc.), etc.** Refer to the Reinstating Your Credential section on the next page. For questions or support, call NACVA Recertification at (800) 677-2009.

#### Imposed Inactive Status

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Credential designees who do not comply with recertification by December 31 will be placed on imposed Inactive status and will be assessed a **\$75 non-compliance late fee** (effective January 1, 2021) at the time of recertifying their credential. Designees holding Inactive status who actively use and/or hold themselves out as an Active CVA/MAFF/ABAR/CBA/MCBA could be subject to disciplinary measures taken by NACVA's Ethics Oversight Board (EOB) where this infraction is discovered. Compliance with the 60-point/60-hour requirement must be reported with applicable fees paid. All applicable fees must be paid before full reinstatement occurs.

#### Emeritus Status for Retiring Credential Designees

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Call NACVA Recertification at (800) 677-2009 or go to [www.NACVA.com/Emeritus](http://www.NACVA.com/Emeritus) for details.

#### Special Consideration for Active Military Service During Deployment

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1. Upon notification and prior to deployment, the NACVA required annual fees will be suspended (put on hold) for the duration of deployment;
2. When the designee returns from active duty, required annual fees will be reinstated;
3. If recertification became due during the period of deployment, such designee is granted one year from when he or she returns to fulfill his or her recertification requirements.

## Reinstating Your Credential



### CERTIFIED VALUATION ANALYST®

	1–2 Years Lapsed	3–5 Years Lapsed	5–7 Years Lapsed	7+ Years Lapsed
*Reinstatement Fee   <b>\$295</b>	✓	✓	✓	✓
Annual Practitioner Membership   <b>\$535</b> or Annual CVA Designee Fee   <b>\$435</b>	✓	✓	✓	✓
Tri-Annual Recertification	Report or attest to 60 hours/points of applicable CPE within prior three years	Report or attest to 60 hours/points of applicable CPE within prior three years, including at least two Recommended CPE Bonus Point Programs	N/A	N/A
Retake CVA Proctored Exam and pay <b>\$625</b> Exam Fee  <i>Per ANSI and NCCA accreditation standards, the CVA proctored exam cannot be waived.</i>	N/A	N/A	✓	✓
CVA Experience Threshold/Case Study	N/A	N/A	N/A	<b>Required</b> Waived if since you dropped your CVA, you have maintained an active ABV credential.



### MASTER ANALYST IN FINANCIAL FORENSICS®

	1–2 Years Lapsed	3–5 Years Lapsed	5–7 Years Lapsed	7+ Years Lapsed
*Reinstatement Fee   <b>\$295</b>	✓	✓	✓	✓
Annual Practitioner Membership   <b>\$535</b> or Annual MAFF Designee Fee   <b>\$435</b>	✓	✓	✓	✓
Tri-Annual Recertification	Report or attest to 60 hours/points of applicable CPE within prior three years	Report or attest to 60 hours/points of applicable CPE within prior three years, including at least two Recommended CPE Bonus Point Programs	N/A	N/A
Retake MAFF Proctored Exam and pay <b>\$625</b> Exam Fee	N/A	N/A	✓	✓

\* Reinstatement Fee is assessed for past and ongoing record keeping, administration, credential designee communication, and credential accreditation reporting requirements.





NACVA and the CTI's

# Business Valuation & Financial Litigation HYBRID & VIRTUAL SUPER CONFERENCE

**Ft. Lauderdale, Florida**

**December 13–17, 2021**

## Full Super Conference Registration Fees

(includes up to 39 hours of CPE):

**\$1,665**

Members

**\$1,850**

Non-Members

**Early  
Registration  
Discounts  
Available**

## À La Carte Super Conference Registration Fees

(one or two hour sessions):

**\$99**

Members

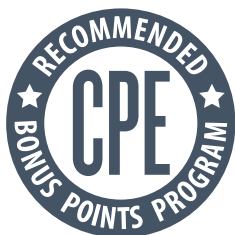
**\$110**

Non-Members

Multiple-attendee discounts also available. Early registration and multiple-attendee discounts apply only to full Super Conference registration.

**To learn more and register, visit [BVFLSConference.com](https://BVFLSConference.com),  
or call Member/Client Services at (800) 677-2009.**

# Complete Tri-Annual Recertification Faster!



## NACVA Tri-Annual Recertification Recommended CPE Bonus Point Programs

Recommended CPE Bonus Point Programs	Actual CPE Hours Earned	Bonus Points Earned	Total Points Earned
<b>Around the Valuation World® Annual Subscription</b> <i>The Definitive Source for Industry News and Updates</i> 12 monthly webcasts and three additional segments, up to 27 hours of CPE Schedule and subscription details at <a href="http://www.AroundtheValuationWorld.com">www.AroundtheValuationWorld.com</a>	Up to 27 (two hours per month, plus three additional one-hour segments throughout the year)	12 (minimum of 12 hours live webcast attendance required)	Up to 39
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<b>Litigation Report Writing Workshop</b> <i>Effective Approaches to Writing for Damages Reports and Litigation Matters</i> Live Training/Live Webinar schedule, discounts, and registration fees at <a href="http://www.theCTI.com/LRW">www.theCTI.com/LRW</a>	8	12	20
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Learn more at [www.NACVA.com/BonusPointPrograms](http://www.NACVA.com/BonusPointPrograms)