

NACVA
CVA, ABAR, MAFF, CBA, MCBA
Recertification Reporting Form



All credentialed members must comply with recertification policies by December 31 of their reporting cycle. Members who do not comply will be placed on Inactive Credential status. Members can also choose Elected Inactive status (see the Tri-Annual Recertification Policies brochure, page 7, 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, 2017. Tri-annual recertification compliance also requires a \$300 recertification fee, which can be waived by taking Recommended CPE Bonus Point Programs.

Please complete the information below and **return to NACVA by the last day of your reporting cycle.**

Name: _____ NACVA Member Number: _____

Firm Name: _____

Credential(s) Year Earned Credential(s) Year Earned Credential Year Earned

CVA _____ MAFF _____ MCBA _____

ABAR _____ CBA _____

Address: _____

City: _____ State: _____ ZIP: _____

Tel: _____ E-mail: _____

Reporting cycle: Jan. 1, 2015 to Dec. 31, 2017

Reporting cycle: Jan. 1, 2016 to Dec. 31, 2018

PROFESSIONAL STATUS/CONDUCT:

1. If you are a CPA, do you hold a current CPA License? Yes No N/A—I am not a CPA If No, please explain: _____

2. Have you ever been convicted of any felony or any crime carrying a punishment of time in prison, whether or not time was served? Yes No If Yes, please explain: _____

3. Have you ever been convicted of a misdemeanor involving moral turpitude (lying, cheating, stealing, or other dishonest conduct) or any equivalent crime in any court of law? Yes No If Yes, please explain: _____

4. Have you ever had any professional/business license, professional certification, or professional membership revoked, refused, or suspended (other than for non-payment of dues)? Yes No If Yes, please explain: _____

NACVA reserves the right to refuse membership and/or certification to any person. A NACVA member or holder of a NACVA certification may have his or her membership or certification terminated based on appropriate grounds therefore as determined by the Executive Advisory Board.

CPE AND POINTS DOCUMENTED/REPORTED:

Recertification Option 1: (See the Tri-Annual Recertification Policies brochure, pages 2–6, for details.)

- Take two Recommended CPE Bonus Point Programs.
- Work with Member/Client Services to build a training bundle to achieve the remaining CPE hours.
- Attest to adhering to the Professional Status/Conduct questions above.
- Log into the Member Portal at NACVA.com using your e-mail and password to view your NACVA/CTI CPE.

Rev. 6/1/17

Recertification Option 2: (See the Tri-Annual Recertification Policies brochure, page 7, for details.)

- Take one Recommended CPE Bonus Point Program.
- Report 60-point/60 CPE-hour requirement in the CPE and Points Documented/Reported section of this form.
- Attest to adhering to the Professional Status/Conduct questions above.
- Log into the Member Portal at NACVA.com using your e-mail and password to pay the \$150 recertification fee. An invoice can be viewed under the Account Details, Billed Invoices section.

Recertification Option 3: (See the Tri-Annual Recertification Policies brochure, page 7, for details.)

- Report 60-point/60 CPE-hour requirement in the CPE and Points Documented/Reported section of this form.
- Attest to adhering to the Professional Status/Conduct questions above.
- Log into the Member Portal at NACVA.com using your e-mail and password to pay the \$300 recertification fee. An invoice can be viewed under the Account Details, Billed Invoices section.

Please list all qualifying courses/conferences validating that you meet NACVA's recertification requirements. (Attach a separate page if more space is needed.) *Training Format: Seminar (S), Conference (C), Self-Study (SS), Webinar (W), Other (O)

<u>Training Format*</u>	<u>Date(s) CPE Taken</u>	<u>Course / Program Title / Sponsor</u>	<u>A # CPE Hours/Points Awarded (one hour equals one point)</u>	<u>B Recommended Training Bonus Points</u>	<u>C Points Total A + B</u>	<u>Fee Determination</u>
		Administration and processing fee for recertification (This fee may be offset in whole or part through participation in one or more of the six (6) recommended programs [see the Tri-Annual Recertification Policies brochure, page 2, for details].)				\$300
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Points for Authorship, Course Development, or Instructing† _____ 12 _____

TOTAL POINTS: Must equal or exceed 60 (Note: excess points CANNOT be carried over to the next reporting cycle) _____

Attestation: I hereby attest that the information provided above is true and accurate and is evidence of my qualifications to continue to carry and display my NACVA credential. I grant NACVA the right to verify any of the information provided upon request and with reasonable advance notice.

Signature: _____ Date: _____

Note: Fees are subject to change at any time. There is a \$25 record search fee for CPE research requests.

† Designees can receive 12 bonus points toward fulfilling their recertification requirements for works of authorship on subject matter pertinent to valuation, litigation, or fraud. This includes writing books, articles, and developing courses for instruction or self-study purposes. Designees may obtain bonus points for teaching/presenting in these relevant areas, as well. To obtain this award of bonus points, simply check the applicable box on the Recertification Form, which is your attestation to your contributions to the intellectual capital of the industry during your reporting cycle. If you are awarding yourself bonus points under this option, CPE earned from this activity cannot be used toward the CPE requirement. You must choose between CPE credit or bonus points.