

Sample Template: Roster Promotional Material for an External Audience

All sponsors must submit a copy of their promotional materials. Some examples include:

- Invitation
- Brochure
- Catalog of course
- Web site screen shots
- Postcards
- Email
- Announcement letters

When submitting the promotional materials with your application, label all required elements as shown in the following sample template:

1. Learning objectives
2. Instructional delivery method
3. Recommend CPE credit and recommended field of study
4. Prerequisites
5. Program level
6. Advance preparation
7. Program description
8. Course registration and, where applicable, attendance requirements
9. Refund policy for courses sold for a fee or cancellation policy
10. Complaint resolution policy
11. Official NASBA sponsor statement (explaining final authority of acceptance of CPE credits)

Learning objectives can be addressed in a variety of ways from a descriptive paragraph to a bulleted list.

Instructional delivery method should be specifically identified as Group Live.

Prerequisites must be specific. If there are no prerequisites, state “none” on the promotional materials. Programs classified as intermediate, advanced and update inherently build upon a prerequisite experience or education.

Advance preparation should be specifically stated. If there is none, state “none” on the promotional materials.

If the program is free of charge, then stating “No fee” would address the refund policy requirement; however, a cancellation policy is still required.

For sponsors who do not wish to include specific policies on promotional materials, a suggested solution is to use:

“For more information regarding refund, complaint and program cancellation policies, please contact our offices at xxx.xxx.xxxx.”

The term “complaint” can be replaced with “concerns.”

CPE RESOURCES PRESENTS: ETHICS FOR ACCOUNTANTS

In this course, we will define ethics and provide you with reasons you should be encouraged to continue educating yourself with the goal of achieving the highest standards of ethical conduct. The course will then discuss ethical reasoning and its application to common dilemmas that you may experience. Throughout this course, you will be provided with case studies that demonstrate the application of ethical principles, values, and ethical reasoning.

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LEARNING OBJECTIVES

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Upon completion of this course, participants will be able to:

- Identify the core values of the CPA profession
- Recognize the goals of accounting ethics education
- Recognize the definition of ethics and integrity

CPE

Participants can earn 2 CPE credits in Behavioral Ethics

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2 ADDITIONAL INFORMATION

Delivery Method: Group Live

Attendance will be monitored using polling questions.

Program Level: Overview

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Prerequisites: None

Advance Preparation: Bring examples of professional experiences in which you have faced an ethical dilemma.

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WHEN

June 8th
9:00 am-11:00 am

WHERE

1234 VANDERBILT WAY,
NASHVILLE, TN

REGISTRATION

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Registration is available
at www.cperesources.com
or by phone at
615-555-1234

COURSE POLICIES

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Requests for refunds must be received in writing by June 1st and will be subject to a cancellation fee. No refunds will be granted after June 1st. For more information regarding refund, complaint, and/or program cancellation policies please contact our offices at 615-555-1234.

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CPE Resources is a member of the Tennessee State Roster Program. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.nasbaregistry.org.

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