

Administrative Policies: Group Live Based Programs

Record Retention Policy: All course records are kept for no less than 5 years. These records include the following.

1. Program outline
2. Program descriptive materials
3. Amount of recommended continuing education credit
4. List of all participants
5. The continuing education credits earned by each participant
6. The dates and locations in which meetings or programs were held
7. Copies of participant evaluations and survey responses
8. Evidence of compliance with responsibilities set out under the standards for continuing professional education programs
9. Moderator/Developer of the program names and credentials.

Attendance Policy and Monitoring: Attendance will be monitored per NASBA requirements to ensure the correct number of CPE credits are assigned to each participant. The instructor will require participants to sign in and record the time at the start of the program on the official sign in sheet. The instructor or other designated support person will also oversee the maintenance of an Attendance Log for the duration of the program. Late arrival/early departure and/or excessive breaks will be recorded, and partial credit will be awarded. Once the first 50-minute hour of CPE has been completed, you will receive .5 hour credit for each 25-minute segment. Participants time in the program will constitute the amount CPE credit awarded. Valuant will maintain electronic copies of sign-in sheets and attendance logs for a period not less than five years.

Refund Policy: Request for refunds must be received in writing no less than fourteen (14) days prior to the program date. These requests may be subject to a 25% cancellation fee. For more information, contact info@bevaluant.com. Valuant issues refunds within thirty (30) days.

Cancellation of a Program by Valuant: Valuant reserves the right to cancel any event due to unforeseen circumstances. Every effort will be made to notify registrants immediately. Cancellation notifications will be sent to the email address recorded with participant registration. Cancelled events are rescheduled or a full refund is given.

Inclement weather:

If the event is rescheduled due to inclement weather and you are unable to attend the rescheduled event or another event, Valuant will issue a full refund.

If the event has not been cancelled and you are unable to travel due to inclement weather, Valuant will issue a full refund.

Complaint Resolution Policy: Please contact Derek Hipp, at derek.hipp@bevaluant.com to register complaints related to program delivery, program content or other details regarding our events.

Program Knowledge Level: Workshops and courses offered by Valuant will be developed and executed in a manner consistent with the prerequisite education and experience of the participants. Our courses will be published as basic, intermediate, advanced, update, or overview, so that participants may determine if the courses are appropriate to their professional competence development needs

CPE Course Development and Updates: Workshops and courses offered by Valuant for CPE credit will be developed and taught by individuals or teams having expertise in the subject matter. Such expertise will have been demonstrated through practical experience and/or education. All courses will use activities, materials, and delivery systems that are current, technically accurate, effectively designed and will contain the most recent publication, revision or review date. Courses will be reviewed annually (or more frequently if necessary due to the subject matter) by a qualified individual or team, other than those who developed the



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programs, to consider currency of the content, technical accuracy, attendee evaluations, and anecdotal feedback. The participation of at least one CPA will be required in the development of every program in accounting and auditing. Such reviews will occur before the first presentation of a course and again after each significant revision.

Content Objectives: The primary learning objective is to maintain or increase the competency of participants through expert discussion, explanation and interactive questioning. The workshops and programs are designed for learners to exercise a practical understanding of new and current issues, as well as the latest changes, in a complex and continually changing industry. Learning activities will be based on relevant learning objectives and outcomes that clearly articulate the knowledge, skills, and abilities that can be achieved by participants in the learning activities.

Photo Release Policy:

Valuant or its contractors may photograph or videotape Valuant events. Attendees agree to allow their image to be used in Valuant publications, website and marketing materials. Images may also be shared with the media. Attendance at Valuant events waives Valuant from liability resulting from these uses.