



# Certified Treasury Professional<sup>®</sup> and Certified Cash Manager<sup>®</sup>

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Sponsor Program CE Registration

*CTP<sup>®</sup>—The Global Standard of Excellence in Treasury*



## Gain the competitive advantage of AFP Sponsor Program Registration

With training dollars shrinking, CTPs and CCMs have become more selective in choosing programs offering Continuing Education (CE) credits. Get your program noticed by promoting it to a targeted audience of financial professionals. AFP will provide you with the documentation you need to show your program qualifies for CTP/CCM recertification credits.

### Sponsor Guidelines and Licensing Requirements

#### AFP's Certification Designations

- Certified Treasury Professional (CTP)
- Certified Cash Manager (CCM)

AFP's CTP/CCM designations reflect an individual's knowledge of corporate treasury and cash management. These designations promote ongoing career development through continuing education requirements. As such, the AFP credentials serve as benchmarks in the industry and increase the financial professional's credibility and visibility in the workplace.

The CTP/CCM credentials represent the highest standard of professionalism in treasury and cash management. To date, more than 19,000 individuals have earned the certification by successfully passing a rigorous examination.

CTP/CCM designees represent corporate and governmental professionals with broad responsibilities in the treasury field. The CTP/CCM certifications also enhance customer relations for bankers, financial services and management consultants, and providers of related services.

### Program Registration

AFP encourages organizations to provide timely continuing education activities to their members, clients, customers, prospects and/or personnel. And, because the CTP/CCM program has continuing education requirements, many providers of continuing education events apply for CTP/CCM sponsor registration. By submitting their CE events for administrative review and registration processing, organizations seeking to include the CTP logo and program approval in their promotional literature can help boost their attendance numbers.

*Note: CTPs and CCMs report recertification credits directly to AFP, and are not required to obtain course approval in advance of participating in a continuing education activity.*

### Qualifying Programs

Under AFP's CTP recertification guidelines only programs covering topics in treasury/cash management, finance and accounting are eligible for CTP/CCM recertification credits.

*Examples of these programs are located on the next page.*

## Examples of programs that do not qualify for CTP/CCM credits:

- Sessions specific to the benefits and features of a company's treasury/finance related products and services
- Fundamental, introductory or exam-prep courses in finance or cash/treasury management
- Personal career development sessions not specific to the finance or cash/treasury management fields
- Business development/sales skills sessions
- Technology-specific courses such as, but not limited to, Quickbooks and Microsoft Word
- Archived webinars/Teleconferences without assessments.

## Description of Program Delivery Methods

**University/College Courses:** Offered by a college or university, generally over the course of a semester or trimester. Instructor-led, either face-to-face or online. Includes at least one, usually multiple, assessments throughout the duration of the course. A three- or four-credit course is equivalent to 18 credits.

**Conferences:** An event lasting one or more days that offers attendees the opportunity to choose from concurrent sessions on a variety of topics. Credit is determined by the total of available 50-minute classroom sessions one person could reasonably attend in their entirety.

**Seminars:** An event covering one topic that lasts as few as 50 minutes up to several days. Credit is determined by dividing the total minutes of instruction, less breaks and meals, by 50.

**Career Development:** Seminars, conferences, etc. concerning subject matter not specific to the treasury/finance/accounting industry. Acceptable career development topics include leadership oriented activities, job-search strategies and presentation skills. Credit is determined by dividing the total minutes of instruction, less breaks and meals, by 50. CTP/CCMs may claim a maximum of three credits in career development topics per three-year cycle.

**Self-Directed and Prerecorded Offerings:** Course that are not taught in a face-to-face setting by an instructor or presenter, such as self-directed online courses and pre-recorded webinars, must include an assessment and certificate of completion to be eligible for approval. Assessments must have an 80% passing score. Credit is determined by dividing the total minutes of instruction by 50.

## Partial Credit Program Registration

AFP may approve selected portions of a program as eligible for CTP/CCM recertification credits. In this occurrence, the sponsor will be informed of the sessions that are not approved for credits. Sponsors must then inform attendees/registrants of qualifying and non-qualifying sessions.

## CTP Logo and Approved Tag Line

Promotional materials for programs approved by AFP for CTP/CCM credits must reference the following tag line:

*Approved for up to \_\_\_\_\_ CTP/CCM recertification credits by the Association for Financial Professionals.*

The sponsor must receive prior authorization from AFP to alter the approved tagline. Camera ready copies of the CTP logo are also provided.

## Application Process

Organizations interested in having their program reviewed for CTP/CCM recertification credits must submit the following:

- A completed Sponsor Program Application. This includes a Limited License Agreement for use of the CTP logo, and the approved AFP tag line.
- Program agenda indicating session title, content description, speaker name and bio, event date, length of each session (start and end times), scheduled breaks and/or meals.
- Description of the method of assessment and a sample "certificate of completion" if applicable.
- Registration Fee

*Incomplete applications will not be processed.*

Each program requires a separate application. Only one application needs to be submitted for a program that will be presented on multiple dates or locations. (Include all dates and locations on the application form.)

The licensing agreement and approval letter are effective for 1 year from the date of the letter. During this period the Sponsor will not be assessed an additional fee if the original program is repeated and the agenda remains unchanged. Once the agreement expires the Sponsor must resubmit the program for approval.

The AFP Sponsor Program Application should be submitted at least one month prior to the program date. This ensures adequate time for processing and allows the sponsoring organization to use the CTP logo in their marketing materials.

## Confirmation of Approved Programs

Sponsors submitting qualifying continuing education programs will receive, via email, a letter confirming approval and camera-ready copies of the CTP logo. The letter includes the attachment “Sponsor Program CE Application” which must be distributed to event participants so they may report and document the approved continuing education credits for that program.

Sponsors will be notified if a continuing education program is not approved.

## Program Changes

### Cancellation

AFP must be notified if session times have changed. The Sponsor must notify AFP and registrants/attendees if a program approved for CTP/CCM credits is cancelled for any reason. Cancelled programs will be removed from the AFP Events Calendar if posted.

*The Sponsor will be refunded 50% of the initial registration fee.*

### Changes to Agenda

The Sponsor must notify AFP if a program approved for CTP/CCM credits is changed for any of the following reasons:

#### — Date and/or Location

The Sponsor will receive a revised approval letter and an updated registration form for distribution to attendees. *A new application is not required.*

#### — Session Times

The Sponsor will receive a revised approval letter if credits are adjusted. *A new Sponsor Program Application and agenda must be submitted for review.*

### Changes to Agenda of Repeat Programs

If a program approved for CTP/CCM credits is revised and is being repeated within the 1 year agreement a new application must be submitted for review.

## Program Registration Renewal

A new Sponsor Program Application must be submitted to renew any program approved for CTP/CCM credits and that will be repeated after the agreement has expired.

## Promoting Your Program Through AFP

Programs approved for CTP/CCM credits may be listed on the AFP Events Calendar, at [www.AFPonline.org](http://www.AFPonline.org). To promote a program approved for CTP/CCM credits indicate your request on the Sponsor Program Application.

## Determining CTP/CCM Recertification Credits

Every 50 minutes of a qualifying program, including Q&A, is equivalent to one CTP/CCM recertification credit. Scheduled meals and breaks are not included. To determine the number of credits a program offers, the total number of qualified minutes is divided by 50 and rounded down to the nearest whole number. CTP/CCM holders earn and report credits to AFP in whole numbers.

## Fees

Program sponsors are assessed an administrative processing and logo usage fee of \$100 per approved recertification credit. Prepayment by credit card is required for amounts of \$500 or less. Invoicing is available for amounts over \$500 only and payment is due within 30 days of invoice.

*Note: The fee is waived for AFP/ITMA Regional Associations*

## Non-compliance Policies

The Limited License Agreement outlines the proper usage of the CTP logo, and promotional tag line. Variations are prohibited.

Failure to comply with these policies may result in any or all of the following:

- Sponsor will not receive approval for their program.
- If the CTP and/or tag line are included in a sponsor’s promotional material without AFP’s prior authorization the Sponsor must issue a retraction to the attendees/registrants.
- The Sponsor will be required to pay a fee, based on \$100 per CE credit, for the unapproved use of the CTP logo and/or tag line.
- The sponsor may be placed on probation and may not be permitted to submit future programs for CTP/CCM credit approval.

## Attendee Records

For auditing purposes all CTP/CCM designees are required to retain proof of their participation in the CE programs being reported. Sponsors must therefore distribute the Sponsor Program Registration Form accompanying the approval letter to their program attendees/registrants.

For more information on the CTP/CCM program, please visit [www.AFPonline.org](http://www.AFPonline.org) and click “Certification.”

# Sponsor Program CE Application

## Registration Form

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This form may be reproduced. Both the Sponsor Program CE Registration and the Limited License Agreement must be completed. Applications **must** include a schedule/agenda indicating session topics, content description, lengths of sessions, speakers, bios, scheduled breaks and meals.

If AFP receives the registration application in ample time, the title of the program, dates offered, location, sponsor and contact information will be included on the Event Calendar located on the AFP Web site at [www.AFPonline.org](http://www.AFPonline.org).

PROGRAM WEBSITE \_\_\_\_\_

LIST THIS PROGRAM ON AFP'S EVENTS CALENDER  DO NOT LIST THIS PROGRAM ON AFP'S EVENTS CALENDER

1. SPONSOR ORGANIZATION NAME: \_\_\_\_\_

2. CONTACT PERSON:  MR.  MS.  MRS.  DR. \_\_\_\_\_

3. TITLE: \_\_\_\_\_

4. ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE/PROV: \_\_\_\_\_ ZIP/POSTAL CODE: \_\_\_\_\_

5. PHONE (OFFICE): \_\_\_\_\_ FAX: \_\_\_\_\_

E-MAIL: \_\_\_\_\_

6. PROGRAM TITLE: \_\_\_\_\_

7. PROGRAM DATE(S): \_\_\_\_\_ PROGRAM LOCATION(S): \_\_\_\_\_

LIST MULTIPLE PROGRAM DATES AND LOCATIONS IN CORRESPONDING ORDER TO ENSURE ACCURATE PUBLISHING:

PROGRAM TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

PROGRAM TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

PROGRAM TITLE: \_\_\_\_\_ DATE: \_\_\_\_\_ LOCATION: \_\_\_\_\_

8. NUMBER OF RECERTIFICATION CREDITS X \$100 = \$ \_\_\_\_\_

FEE INCLUDED  FEE WAIVED (AFP/TMA REGIONAL ASSOCIATION)

9. METHOD OF PAYMENT:

CHECK  AMERICAN EXPRESS  DINERS CLUB  MASTERCARD  VISA  WIRE TRANSFER (PLEASE CONTACT US WITH DATE PAID)

CARD NUMBER: \_\_\_\_\_ EXPIRATION DATE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ (FOR CREDIT CARD PAYMENTS)

INVOICE REQUESTED (AMOUNTS OVER \$500 ONLY. INVOICING NOT AVAILABLE FOR AMOUNTS LESS THAN \$500)

10. DATE APPROVAL NEEDED: \_\_\_\_\_

(PLEASE TAKE INTO ACCOUNT ANY MARKETING DEADLINES YOUR ORGANIZATION MAY HAVE AND ALLOW 2 WEEKS FOR PROCESSING)

### FOR AFP OFFICE USE ONLY

CC/CK# \_\_\_\_\_

ID# \_\_\_\_\_

Amt \$ \_\_\_\_\_

LB Date \_\_\_\_\_

# Sponsor Program CE Application

## CTP/CCM Program Registration Limited License Agreement

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Whereas \_\_\_\_\_ (hereinafter referred to as "Sponsor") has applied to the Association for Financial Professionals (AFP) for limited use of the CTP logo in advertising materials pertaining to the following program approved for CTP/CCM recertification credits.

PROGRAM TITLE: \_\_\_\_\_ DATE(S): \_\_\_\_\_

This license permits a Sponsor to display the CTP logo as specified herein and to display the statement "Approved for up to \_\_\_\_ CTP/CCM recertification credits by the Association for Financial Professionals." This license is effective for one year from date of approval and is not subject to renewal. A new application is required.

**Therefore, the Sponsor agrees to the following terms and conditions of this limited license:**

1. All policies and guidelines will be followed as outlined in this brochure.
2. The CTP logo remains the property of AFP at all times.
3. The Sponsor is not authorized to use the logo for any programs or services other than those herein named in the limited license agreement.
4. The Sponsor agrees to display the officially recognized registration mark ® next to the lower right-hand corner of the CTP logo used in its authorized materials.
5. The Sponsor further agrees to include the following sentence immediately after the CTP logo with no intervening verbiage between the logo and the statement: "Approved for up to \_\_\_\_ CTP/CCM recertification credits by the Association for Financial Professionals."
6. The logo may be displayed using either AFP's official CTP logo color (PMS 3005) and black, black only, or white reverse. The logo must be used as a single unit in its entirety.
7. The Sponsor agrees that the logo will not be positioned so as to imply an endorsement of the Sponsor's program(s) by AFP.

ACCEPTED THIS \_\_\_\_\_ DAY OF \_\_\_\_\_, 20 \_\_\_\_\_

SPONSOR NAME: \_\_\_\_\_

BY (PLEASE PRINT) : \_\_\_\_\_

TITLE: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_

Effective 10/08

**Please forward completed application to:**

Sponsor Program CE Registration  
Association for Financial Professionals  
4520 East West Highway  
Suite 750  
Bethesda, Maryland 20814-3214

**OR**

Fax to 301.907.2864.



*Association for  
Financial Professionals®*

4520 East-West Highway Suite 750  
Bethesda, MD 20814  
[www.AFPonline.org](http://www.AFPonline.org)

## **About AFP®**

The Association for Financial Professionals (AFP) serves more than 16,000 individual members throughout all stages of their careers in treasury and financial management. Headquartered in Bethesda, MD, AFP provides professional certification, continuing education, research, development of industry standards, financial tools and publications, training and career development and representation to legislators and regulators. AFP's global reach includes AFP of Canada and gtnews, a London-based, on-line resource for the treasury and finance community.

AFP is the daily resource for its members to seek answers, solutions, best practices and collaboration with peers. For more information about AFP, visit [www.AFPonline.org](http://www.AFPonline.org).