

The Certified IRA Specialist Program



Common Purpose. Uncommon Commitment.

Obtaining the Certification

CUNA Mutual Group offers the opportunity for participants in the IRA Supertrain Compliance Workshops to earn the professional designation of Certified IRA Specialist. Certification is earned in one of three different learning tracks by completing the following process:

IRA Associate Track

Attend IRA Associate Supertrain track and successfully complete a two-part certification process:

1. Online written exam
2. Verbal exam

IRA Expert Track

Attend IRA Expert Supertrain track and successfully complete a two-part certification process:

1. Online written exam
2. Exam project

IRA Leadership Track

Attend IRA Leadership Supertrain track and successfully complete a two-part certification process:

1. Online written exam
2. Exam project

Once a candidate has passed the written exam with a grade of 80% or better and completed the practical exam satisfactorily, he or she will be registered as a Certified IRA Specialist at the level he or she chose to pursue. The certification period begins January 1st of the year after both parts of the certification process are completed and is good for the following three years. (For example: Mary completes both parts in 2009; her certification is valid through December 31, 2012).

Renewing Your Certification

Participants who have completed the Certified IRA Specialist program may earn credits toward renewing their certification. Recertification requires a total of 30 credits earned over the three-year certification period and extends the certification another three years. If the recertification process is not completed by December 31st of the year certification expires, the individual begins the original certification process again. We will track credits for Certified IRA Specialists.

Recertification credits can be earned in any combination of the following ways and 18 credits must come from attendance at a Supertrain workshop at the Expert or Leadership level.

<u>Program attended</u>	<u>Credits for completion*</u>	<u>Maximum number of credits per event</u>
IRA Supertrain Compliance Workshop (Expert or Leadership level)	18	None
CUNA Mutual Group Webinar	1	1 credit per Webinar title each 3-year period
CUNA Mutual Group eLearning Package (Package includes all 5 e-Learning courses)	2	2 credits per eLearning package each 3-year period
HSA or Coverdell ESA Workshop (Held in conjunction with Supertrain)	1	2 credits per year
Advanced IRA Topics Seminar (CUNA Mutual Group's Trainer)	5	5 credits per year
IRA Essentials Seminar (CUNA Mutual Group's Trainer)	2	2 credits per year
HSA or Coverdell ESA Workshop** (CUNA Mutual Group's Trainer)	2	2 credits per workshop per year
Train the Trainer	2	2 credits per year

* Credits in excess of the required 30 each three years do not carry over to future recertification.

** Does not include HSA or ESA session held in conjunction with Supertrain.