

*The FPA National Capital Area Presents:  
The 2019 Winter Educational Symposium*

*“Planning for the 21<sup>st</sup> Century – Understanding the  
Changing Profession and New Retirement Challenges”*

**Monday, January 21, 2019 – Dulles Hyatt, Herndon, VA**

**ATTENDEE INSTRUCTIONS FOR OBTAINING EVENT HANDOUTS**

1. Go to this Link for the Ethics and/or Symposium Handouts: [www.advisoradit.com/fpancawintersymposium](http://www.advisoradit.com/fpancawintersymposium)  
There is one link for both Ethics and Symposium events.
2. You will see a list of logos when you reach the Passport. Please click on the “+” sign next to our logo for the Handouts. Please click on the “+” next to the Sponsor logos for the Sponsor handouts.
3. Please remember to bring the downloaded materials for the Symposium on your mobile device or in paper form for the day. No class materials will be given at check in. You must bring your own mobile device or materials with you to all sessions.
4. Once you obtain your Handouts, you may register for your CE Courses. **CLICK ON THE COURSE TAB.**
5. Log in – Use your email and zip code that you used when you registered for the Symposium. Once in, you will see the available courses.
6. **Please see the third page of these instructions for descriptions of the icons with each course.**
7. Please note: If we do not have your CE reporting ID numbers, you may not be loaded into the system for CE reporting capabilities. Please log into the system and check to make sure that you have a GREEN icon for ALL of the CE you wish to obtain. If you are missing a GREEN icon for any of the CE you wish to obtain, **you may edit your profile in the upper right hand corner, once you have logged into the COURSE TAB!** (When you log in, you should see a GREEN icon. Click on that icon. The next screen should list CFP, MD Ins., VA Ins., CIMA. Please make sure you have a GREEN icon next to any of those types of CE you wish to obtain. If the green icon is missing, edit your profile to include the License Number for your CE that you need – CFP, MD Insurance, or VA Insurance)
8. You must check-in and check-out through this event tool in order to receive your CE. If you do not have a mobile device, please get a paper credit reporting sheet from Peggy on the day of the event.
9. **Please note that if you check in several days in advance to check your CE options, you will need to check in the day of the event again to Log in and out of the courses! PLEASE DOUBLE CHECK THE AM AND PM OPTIONS on the TIME FIELD WHEN YOU LOG IN!**
10. Please take the survey after each course during the day.
11. Check out the short video below to learn more about the CE check-in process.  
<https://vimeo.com/231591457>

**ATTENDEE INSTRUCTIONS UPON ARRIVAL AT THE SYMPOSIUM**

12. Ethics and Symposium Attendees, please check-in at the Registration Desk, pick up your Name Badge, and sign in. If you do not have a mobile device, you will receive your Ethics and Symposium Credit Reporting Sheet at check in. If you signed in for Ethics, you are signed in for the Symposium, as well. If you leave early, please turn in your name tag and check out with us at the Registration Desk. **If you did not report your**

- credits on a mobile device, please make sure you turn in a paper Credit Reporting Sheet.** You must do one or the other in order to receive your credits.
13. Enjoy some food and drinks while you mingle with our Sponsors. Our Sponsors look forward to meeting you! Please talk with them throughout the day during breaks and networking times. Remember to ask the Sponsors for a raffle ticket after you have talked with them. The raffle ticket drawing will be at the end of the day, and gives you a chance to win one of **SEVERAL GREAT RAFFLE PRIZES!**
  14. We have arranged with the hotel to supply power strips at Attendee seats, as well as codes for connecting to the wireless network so that you can use your mobile devices to review the handouts for each session.
  15. Please take a seat in the ballroom and be ready for our 6:30AM Ethics Course and at 8:45AM for Opening Remarks for the Symposium.
  16. Please remember to take the evaluation survey after each and every presentation on your mobile device. Your help is very valuable in creating and structuring these programs, so please give us a short amount of your time and provide feedback for the Symposium.
  17. Even if you checked in several days ago to check your CE options, you will need to check in the day of the event again to Log in and out of the courses. **PLEASE DOUBLE CHECK THE AM AND PM OPTIONS on the TIME FIELD WHEN YOU LOG IN!**
  18. Check out the short video below to learn more about the CE check-in process.  
<https://vimeo.com/231591457>

### **ATTENDEE INSTRUCTIONS AT THE END OF THE DAY**

1. Please make sure you have filed for your credits on your mobile device throughout the day for each session, or you have completed the paper Credit Reporting Sheet. We must have one of these two options completed in order to file your credits.
2. Please include your **ID NUMBERS** if you are using the paper Credit Reporting Sheet. Without the proper ID numbers, we cannot successfully file your credits. If your ID numbers are NOT in the electronic system, please edit your profile to get those properly included in the system for reporting purposes.
3. If you are using the paper Credit Reporting Sheet, please **CIRCLE THE CREDITS YOU NEED** – CFP, MD INS, VA INS so that we have an audit trail of your attendance and your requested credits.
4. All Attendance Certificates for all credits have been included on our conference tool for your download.
5. Your CFP, MD Insurance and VA Insurance Credits will be filed electronically, provided that we have the correct information from you to file for these credits. Please note that you must attend the entire session in order to receive the credits for the session. Credits will be filed with the CFP Board, the MD Insurance and the VA Insurance within two weeks of the program. Please self-report your CIMA and CPA CPE credits.
6. Your Ethics CFP CEU will be filed electronically by the owner of the course, Bonnie Kirchner, provided that we have the correct information from you to report to Bonnie for these credits.
7. After closing remarks and the raffle drawings, we will have a short Happy Hour at the hotel lobby bar. Please join us for a few minutes to network with your colleagues!
8. Have a safe trip home! Thank you for coming!
9. We will be sending you a survey monkey evaluation form after the event. Your help and cooperation in completing that evaluation will be most appreciated! Thank you!



# Help Us Go Green!



Use your Event Passport Link to:

- access all conference & sponsor materials
- register and track your CEs
- take surveys



## Three Easy Steps to Register For CEs!

### 1. Log In

**CE REGISTRATION**

Be sure to enter the email and zip code you used to register for this event.

Email Address

Zip Code

Go to the Courses tab. Use the email and Zip you provided the FPA. Once in, you will see the list of available courses.

Here's what the icons mean:



You are CE eligible for this course



You need to finish CE registration



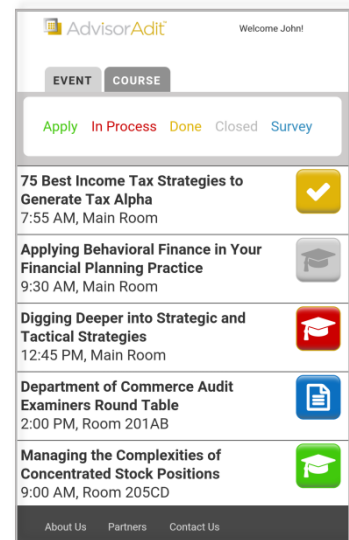
You have successfully applied for CEs



The Course is closed



Take a quick survey



### 2. Check In/Check Out

**Checking In:** If you are required to check in, you will be asked to check in upon arrival and record your start time.

**Checking Out:** At the course end, enter your end time, check you complied with CE policies and enter the course PIN, which the speaker will provide. This is required to receive credit!

### 2. Take the Survey!

Please provide the FPA your feedback. Ask for additional speaker information if you like!

