NIPA is Your Source for World-Class Continuing Professional Education for TPA Business Owners and Their Employees

Maintaining your professional skills and knowledge in the dynamic business environment of retirement plan administration requires year-round continuing education. The National Institute of Pension Administrators (NIPA) is the most cost-effective resource for continuing education to keep TPA business owners and their staff ahead of the competition. As an approved ERPA education sponsor, NIPA delivers world-class education, allowing you to stay up-to-date on the latest information, legislation and trends in the retirement plan industry. In return, you are able to grow revenue dramatically, streamline processes and increase productivity.

NIPA focuses on educating retirement industry professionals in the practical applications of plan administration and provides best practices on the business aspects of running a TPA firm. Through extensive educational offerings, NIPA continues delivering on its promise of providing comprehensive programs significantly grow member companies, and, in turn, the retirement plan industry. These opportunities are designed for your convenience by allowing you to plan your training for the entire year. We look forward to your participation and thank you for your continued support.

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Earn Continuing Professional Education (CPE) Credits with NIPA

NIPA ◆
All educational programs offered by the National Institute of Pension Administrators (NIPA) provide continuing professional education (CPE) credits. Non-designated Executive Members must earn 10 CPE credits annually to maintain their membership. APA designees must earn 15 CPE credits annually to maintain their designation, and APR designees must earn 10 CPE credits annually. Affiliate, student and non-designated Business Owner Members are exempt from CPE credit requirements. Visit www.nipa.org to review the full continuing professional education policy.

ERPA ◆
NIPA is recognized by the IRS as an approved Enrolled Retirement Plan Agent (ERPA) sponsor of continuing education programs, including NIPA live webcasts, online certificate courses, conferences and most webcast recordings. The ERPA Special Enrollment Examination is administered by the American Institute of Retirement Education, LLC (AIRE), a partnership with NIPA and the American Society of Pension Professionals & Actuaries (ASPPA).

CFP BOARD ◆
NIPA is recognized by the Certified Financial Planner Board of Standards Inc. (CFP Board), and program participants may earn Certified Financial Planner (CFP) continuing professional education (CPE) hours. CFP certificants are required to complete 30 hours of CPE in each two-year reporting period (2 hours must be CFP Board's Standards of Professional Conduct). The reporting period ends the last day of the CFP certificant’s renewal month.

JBEA ◆
NIPA is recognized by the Joint Board for the Enrollment of Actuaries (JBEA) as a qualifying sponsor of continuing education programs for enrolled actuaries.

NASBA ◆
NIPA is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education (CPE) on the National Registry of CPE Sponsors. 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.learningmarket.org.

CPE KEY
Use this helpful key to determine the CPEs you will earn from each NIPA educational program.

◆ NIPA ◆ ERPA ◆ CFP Board ◆ JBEA ◆ NASBA

“Continuing education that we can obtain at NAFE, BMC or through webcasts provides a great deal to get your needed CPEs for your NIPA designations.”
Marc M. Roberts, APA, ERPA, President, Associated Pension Consultants
APA/ APR Designation Programs

NIPA provides the practical information and effective, relevant designation programs that are necessary to achieve career advancement and improve day-to-day performance.

Through NIPA’s Accredited Pension Administrator (APA) and Accredited Pension Representative (APR) programs, you will earn a prestigious designation that carries with it a sense of personal accomplishment and demonstrates your professional competency.

APA DESIGNATION BENEFITS
As an APA student working toward your designation, you will gain comprehensive insight into the knowledge and skills needed to successfully perform daily administrative tasks, including: determining eligibility; allocating contributions; fulfilling reporting and disclosure requirements; processing distributions; performing compliance testing; correcting errors and much more.

Potential APAs include:
- Pension Administrators
- Relationship Managers
- ERISA Compliance Specialists

APR DESIGNATION BENEFITS
As an APR student, you will survey all types of retirement plans and engage in advanced study of retirement plan topics ranging from fiduciary responsibility and prohibited transactions to minimum coverage testing and distributions.

Potential APRs include:
- Retirement Plan Personnel
- Financial Consultants/Planners
- Registered Investment Advisors

DISTINGUISH YOURSELF AND YOUR FIRM WITH NIPA DESIGNATIONS
Strengthen your value in your workplace

“NIPA designations bring more quality to what we give our clients. People stay up-to-date on issues and there is a structured environment to make sure that they are held accountable for the knowledge.”

Jennifer Rello, President, Benefit Associates, Inc.
### APA COURSES*  

**Course 1 (open book)**  
**APA 1: Fundamentals of Qualified Plan Administration (10 CPE Credits)**  
- Qualified Plan Overview  
- Qualified Plan Establishment  
- Eligibility and Participation Requirements  
- Contribution and Earnings Allocations  
- Vesting and Forfeitures  
- Minimum and Maximum Contributions  
- Permitted Disparity  
- Minimum Coverage, Minimum Participation and General Nondiscrimination Testing  
- Reporting and Disclosure  
- Annual Valuation Process  
- IRS/DOL Guidance  
- ERISA  

**Course 2**  
**APA 2: 401(k) Plan Administration (20 CPE Credits)**  
- 401(k) Plan Design  
- Safe Harbor 401(k) Plans  
- Automatic Enrollment  
- Plan Investments and Trust Issues  
- Fees and Expenses  
- Census and Year-end Data  
- Eligibility and Vesting  
- Compensation  
- Contribution Funding and Calculations  
- Plan Assets, Trust Accounting and Reporting  
- Minimum Coverage Testing  
- 402(g) and 415 Limits  
- ADP and ACP Testing  
- Top-heavy Rules  

**Course 3 (open book)**  
**APA 3: Distributions and Loans (20 CPE Credits)**  
- Administering Distributions  
- The Distribution Process  
- Distributable Events  
- Survivor Annuity Requirements  
- Optional Forms of Distributions  
- Determining Vested Accrued Benefits  
- Lost Participants  
- Mandatory Distributions  
- Tax Treatment of Distributions  
- Rollovers  
- Distribution Reporting  
- In-service Distributions and Hardship Withdrawals  
- Qualified Domestic Relations Orders  
- Required Minimum Distributions  
- Death Benefit Distributions  
- Corrective Distributions  
- Plan Termination Distributions  
- Participant Loans  

**Course 4**  
**APA 4: Selected Topics in Retirement Plans (20 CPE Credits)**  
- Fiduciary Responsibility  
- Qualified Default Investment Alternatives  
- Prohibited Transactions  
- IRS Correction Programs  
- Reporting and Disclosure  
- Plan Amendment and Termination  
- Controlled Groups and Affiliated Service Groups  
- Retirement Plan Issues in Mergers and Acquisitions  
- Nondiscrimination under IRC 401(a)(4)  
- 403(b) Plans  

### APR COURSES*  

**Course 1 (open book)**  
**APR 1: Fundamentals of Qualified Plan Administration (10 CPE Credits)**  
- Qualified Plan Overview  
- Qualified Plan Establishment  
- Eligibility and Participation Requirements  
- Contribution and Earnings Allocations  
- Vesting and Forfeitures  
- Minimum and Maximum Contributions  
- Permitted Disparity  
- Minimum Coverage, Minimum Participation and General Nondiscrimination Testing  
- Reporting and Disclosure  
- Annual Valuation Process  
- IRS/DOL Guidance  
- ERISA  

**Course 2**  
**APR 2: Advanced Topics in Retirement Plans (20 CPE Credits)**  
- Minimum Coverage  
- Nondiscrimination in Benefits and Contributions  
- Top-heavy Rules  
- IRC Section 415 Limits  
- Limits on Employer Deductibility  
- IRS Correction Programs  
- Controlled Groups and Affiliated Service Groups  
- 401(k) Plans  
- 403(b) Plans  
- Fiduciary Responsibility  
- Fiduciary Issues: Participant-directed Accounts and Prohibited Transactions  
- In-service Distributions and Plan Loans  
- Lump-sum Distributions, Required Minimum Distributions and Direct Transfers  

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* Topics are subject to change. Please visit www.nipa.org for the latest information.  
* APA Courses 1 and 3 and APR Course 1 are open book and may be taken from home or work, rather than having to report to a testing location during any of the three exam testing windows. APA Courses 1 and 3 and APR Course 1 do not require a proctor; however, APA Courses 2 and 4, along with APR Course 2, must be completed at a proctored testing location during the exam testing windows. Exam testing windows are listed on page 6.
**APA/APR Designations**

**EARNING THE APA DESIGNATION**
- Complete four self-study courses and examinations
- Pass the examinations for APA Courses 1, 2, 3 and 4 (Courses 1 and 3 are open book)
- Maintain the designation by completing 15 hours of CPE credits and current NIPA membership (annually)

**EARNING THE APR DESIGNATION**
- Complete two self-study courses and examinations
- Pass the examinations for APR Courses 1 and 2 (Course 1 is open book)
- Possess a current FINRA Series 6, 7, 65, 66 or 24 license or insurance license
- Maintain the designation by completing 10 hours of CPE credits and current NIPA membership (annually)
- See below if you hold an ERPA designation

**EXAM WINDOWS AND DEADLINES**

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<tr>
<td>November 1 – November 30</td>
<td>October 15</td>
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**APA/APR DESIGNATION TIMETABLE**

The APA and APR designations must be earned within three years from the date of successful completion of your first exam. Exams passed more than three years prior to the successful completion of your last exam will expire and must be retaken.

**EXAM RETAKE POLICY** – Any student who registers for an exam and does not take it, or fails, may retake the exam for a fee of $150. This fee only applies for two testing windows from the date of the first attempt.

**CALLING ALL ERPAs!**

For retirement plan professionals who obtain the Enrolled Retirement Plan Agent (ERPA) designation, NIPA will automatically grant the APR designation upon joining NIPA – no insurance license or FINRA series 6, 7, 65, 66, 24 necessary! ERPA designees are also eligible to obtain the APA designation by taking a single open book, comprehensive, online exam from their home or office.

**EXAM EQUIVALENCIES**

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<td>CPC: ASPPA</td>
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<td>CLU: American College</td>
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<td>CFP: Certified Financial Planner Board of Standards, Inc.</td>
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<td>EA: Joint Board for the Enrollment of Actuaries</td>
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<td>QPA: ASPPA</td>
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<td>CRSP: Institute of Certified Bankers</td>
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<td>RPA: International Foundation of Employee Benefit Plans</td>
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<td>QPFC</td>
<td>ASPPA</td>
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**ERPA: Enrolled Retirement Plan Agent**

**APA/APR exam enrollment is easy!**

Visit www.nipa.org for full details. Regular student enrollment fees are $250/members and $375/nonmembers per course and include a complimentary study guide. Business Owner Member employee discounts are available. See page 7 for details.
BUSINESS OWNER MEMBER EMPLOYEE DISCOUNTS FOR APA/APR

Nonmember employees of NIPA Business Owner Members have the ability to register for the APA and/or APR exams at the member rate.

- Nonmember Exam Registrations: $375
- Member and Business Owner Member Employee Exam Registrations: $250 - a $125 savings
- Member and Business Owner Member Employee Discounts on study materials - up to $25 in savings per study material

PENCHECKS NIPA APA DESIGNATION SCHOLARSHIP

NIPA and PenChecks will award $6,000 in scholarships annually through the PenChecks NIPA APA Designation Scholarship. The scholarship will be provided to six individuals who have successfully completed the application process and demonstrated how the APA designation will improve their career in the retirement plan industry. Two recipients will be selected for each testing window and will receive $1,000 each to take all four APA exams. Upon successful completion of all exams and earning the designation, PenChecks will sponsor the first year of NIPA Business Owner or Executive membership - a value of up to $550! Learn more and apply at www.nipa.org/APAscholarship.

“Earning the APA and APR designations through NIPA has been instrumental in our growth as a TPA company. NIPA is the easiest and most economical option for earning CPE credits for our entire staff.”

Marc M. Roberts, APA, ERPA, President, Associated Pension Consultants
NIPA Online Certificate Courses

Retirement plan professionals face time contraints and heavy workloads in this dynamic industry. NIPA’s five online certificate courses work around your schedule, letting you choose the best time to study and complete the exams. Each course is comprised of online content, a comprehensive exam and a certificate issued at the time of successful completion.

A COMPREHENSIVE GUIDE TO 401(K) PLANS

Continuing Education: 16 NIPA CPE; 16 ERPA CPE
Cost: Members $495; Nonmembers $595

A Comprehensive Guide to 401(k) Plans delivers an in-depth examination of the regulatory requirements and operational features of the most popular employer-sponsored savings arrangement for today’s workers — the 401(k) plan.

This course begins with an overview of the legal and regulatory framework that serves as the foundation for 401(k) plans and the various players that must work together to ensure a plan’s success. The course then addresses the broad spectrum of operational and compliance issues that arise in the life cycle of a 401(k) plan — from plan establishment to plan termination. Key topics addressed in the course include popular 401(k) plan design options, plan establishment procedures, eligibility and vesting calculations, contribution and deduction limits, compliance testing, distribution and loan options, government reporting and plan correction strategies.

DISTRIBUTION ADMINISTRATOR

Continuing Education: 16 NIPA CPE; 16 ERPA CPE
Cost: Members $495; Nonmembers $595

The Distribution Administrator Certificate program provides training for entry-level staff who typically handle distributions. The program is comprehensive enough to help experienced pension administrators broaden their understanding of the ever-expanding rules, practices and procedures affecting qualified retirement plan distributions. The program is comprised of two courses: Distribution Course 1: Distribution Basics and Distributions Course 2: Special Distribution Categories.

THE FUNDAMENTALS OF QUALIFIED PLANS

Continuing Education: 5 NIPA CPE; 4 ERPA CPE
Cost: Members $295; Nonmembers $395

The Fundamentals of Qualified Plans course covers a range of topics designed to familiarize the audience with the general requirements of qualified plans. It is designed to be an introduction to qualified plan rules and is presented at a level suitable for those new to the retirement plan industry. Course topics include a qualified plan overview, plan establishment, eligibility and participant requirements, contribution allocations, minimum coverage and more. Examples are presented throughout, and review questions are covered at the end of each section. NIPA suggests that this course be completed prior to the APA or APR course work.

IRA ESSENTIALS

Continuing Education: 5 NIPA CPE; 4 ERPA CPE
Cost: Members $295; Nonmembers $395

With 78 million baby boomers preparing to retire in the next decade and Roth IRA rule changes that make both types of Roth IRAs more accessible, the volume of assets moving from qualified plans into IRAs is expected to reach levels never before experienced in the retirement plan industry. Retirement plan professionals and recordkeepers must be prepared to handle a heavy volume of plan distributions destined for IRAs efficiently and in compliance with the many related laws and regulations. IRA Essentials was established to help retirement plan professionals better understand the savings opportunity presented by IRAs and assess whether their IRA-related transactions are both efficient and in compliance. This course provides pension administrators with the IRA information that is essential to their business, including the various types of IRAs, rollover options and related operational implications, beneficiary options, IRA conversions and more.

LOAN ADMINISTRATOR

Continuing Education: 5 NIPA CPE; 5 ERPA CPE
Cost: Members $295; Nonmembers $395

The Loan Administrator certificate course provides a comprehensive training option and review course for staff members whose job responsibilities include any aspect of participant loan processing or loan maintenance. Given the ever-increasing complexity of rules and regulations governing retirement plan operations, this course supports all levels of practitioners in the ongoing effort to stay up-to-date on the latest compliance requirements and also includes sample documentation and best practice recommendations to help practitioners in benchmarking loan management best practices. Topics include loan limit calculations, loan documentation, loan offsets and more.
NIPA’S ONLINE CERTIFICATE COURSES

- Provide comprehensive, timely information on various aspects of pension administration
- Offer online convenience at a low cost
- Meet the needs of entry-level as well as experienced pension administrators

For more information on NIPA’s online certificate courses and to enroll, visit www.nipa.org.

“Through all of its educational resources, seminars and workshop opportunities, NIPA has made me an extremely competent and confident consultant.”

Sherrie Wierenga, APA, Consultant, Associated Pension Consultants
NIPA Online Education

NIPA’s online education is also presented via webcasts, providing retirement plan professionals with timely education from the comfort of their workstations. NIPA’s webcasts serve both pension administrators and TPA business owners with 100 minutes of the latest industry news and how it may affect you and your business.

Visit www.nipa.org for the latest webcast schedule.

NIPA LIVE WEBCASTS ◆◆

Length: 100 minutes each
Continuing Education: 2 NIPA CPE; 2 ERPA CPE
Cost: Members $99; Nonmembers $199

NIPA’s live webcasts, typically held six times a year, provide low-cost, online education that allows you to maximize your industry knowledge while earning two (2) NIPA CPE credits and two (2) ERPA CPE credits. Presented by some of the industry’s leading experts, previously held webcast topics include: participant fee disclosure regulations, EFAST2, IRS corrections, cash balance plans and more. Ethics webcasts will also be presented on an annual basis.

NIPA WEBCAST RECORDINGS ◆◆

Length: 100 minutes each
Continuing Education: 2 NIPA CPE; 2 ERPA CPE
Cost: Members $99; Nonmembers $199

To earn additional CPE credits, or if you missed a previously held webcast, you may purchase webcast recordings. A list of all webcasts can be found on NIPA’s website. The contact person on the webcast recording order form will receive two (2) NIPA CPE and when applicable two (2) ERPA CPE credits upon successful completion of the online quiz.

LINKEDIN

As social media continues to redefine how we communicate, LinkedIn has become a powerful interactive tool in facilitating the exchange of ideas. NIPA is pleased to provide our community with the NIPA LinkedIn group. Access the group to engage in discussions with industry professionals on the latest developments, to seek advice or to share your success stories.

Business Owner Education

NIPA B2B EXCHANGE

The NIPA B2B Exchange is a series of informal, yet structured, open forums for TPA business owners to share first-person accounts of success stories, best practices and tips to understand and manage business operational challenges you face as a TPA business owner.

The NIPA B2B Exchange is an exclusive NIPA Business Owner Member benefit available at no additional cost.

Hosted every month, these NIPA Business Owner Member-only exchanges will allow you to dive deep into specific industry topics and walk away with immediate takeaways to apply to your TPA firm. Roundtable discussions are limited to 15 participants each to maximize collaboration.

Attend B2B Partner Exchanges quarterly to learn about NIPA Business Owner resources and how others are using those tools. The B2B Partner Exchanges are open to all interested attendees.

STRICTLY BUSINESS E-NEWSLETTER

Through Strictly Business, TPA business owners are able to access relevant content that is designed exclusively for their needs. The e-Newsletter is delivered on a monthly basis with the most up-to-date content. Expert insights into economic trends, legal updates and business operations tips all provide information that TPA business owners can utilize to stay current and improve their business.
NIPA Conferences

NIPA's face-to-face education and networking events provide you the opportunity to receive 18+* NIPA and ERPA CPE credits. As a NIPA member, you will enjoy special discounted registration rates in addition to access to the NIPA member directory and networking events.

BUSINESS MANAGEMENT CONFERENCE (BMC) ✪
The only retirement industry conference focused on the business aspects of running a TPA firm.

The NIPA Business Management Conference (BMC) is an exclusive venue for owners and executives of third party administration firms to gather and share information and insights on the most effective business methods. The BMC is a great way for business owners to jump start the year.

2015 BUSINESS MANAGEMENT CONFERENCE
January 7–9, 2015
The Sanctuary on Camelback Mountain
Scottsdale, AZ
www.nipa.org/bmc

NIPA ANNUAL FORUM & EXPO (NAFE) ✪ ✪ ✪ ✪
Designed by retirement plan professionals for retirement plan professionals.

From industry trends to day-to-day tasks, from the impact of recent or forthcoming legislation to practical tools for helping you advance your pension administration knowledge, NAFE is a must-attend event for retirement plan industry professionals.

NAFE also has a virtual component designed to promote continuing education for retirement plan professionals who are unable to attend the event in-person.

2015 NIPA ANNUAL FORUM & EXPO
May 3–6, 2015
The Cosmopolitan of Las Vegas
Las Vegas, NV
www.nipa.org/nafe

*Total CPE credits are subject to change based on actual conference times.
About NIPA

Since its formation in 1983, the founding concept and specific purpose of NIPA has been to educate and train retirement plan practitioners to grow their TPA firms. In its 30+ years, NIPA has grown from an eight-person work-study group to a national organization with more than 1,100 members.

NIPA is a national association that serves TPA business owners by creating environments with world-class education, best-practices exchanges, and deep peer-to-peer relationships. As a result, our members’ revenue grows dramatically, processes are streamlined, productivity increases, and life-long relationships are developed. For more information, visit www.nipa.org.

Grow Your Business with NIPA

Become a NIPA member and save on educational opportunities year round:

- BMC and NAFE registration
- NIPA webcasts
- NIPA online certificate courses
- APA/APR designations

To learn more about the benefits of NIPA membership, visit www.nipa.org.