



Additional information about the courses offered at the UPPO Annual Conference eligible for CPE credit

Delivery method

Group-live

Prerequisites and advance preparation

Basic

Prerequisites: none

Experience needed: No experience working in the profession is needed. We strongly encourage participants to attend the live, Unclaimed Property 101: The Calm Before the Storm scheduled for Sunday, March 19.

Intermediate:

Prerequisites: none

Experience level: The intermediate track is designed for professionals who have worked in unclaimed property for 1 - 2 years. We encourage participants to attend the live, Unclaimed Property 101: The Calm Before the Storm scheduled for Sunday, March 19.

Advanced:

Prerequisites: none

Experience level: The advanced track is designed for professionals who have worked in unclaimed property for 2+ years.

Learning objectives

Basic: Upon completion of the conference, beginning participants will gain a better understanding of the reporting requirements and sourcing rules relating to unclaimed property. Additionally, participants will enhance their unclaimed property knowledge by networking with their industry peers, other holders, state representatives and service providers regarding industry standards and current issues surrounding unclaimed property.

Intermediate: Upon completion of the conference, participants will be able to organize (transform or streamline) their escheatment department and identify (evaluate or assess) process weaknesses in order to implement suggested best practices. Intermediate level participants will further their unclaimed property knowledge by continued networking with their peers, including holders, state representatives and service providers regarding issues affecting their industry and current issues surrounding unclaimed property.

Advanced: Upon completion of the conference, participants will understand emerging trends affecting unclaimed property departments, and recommended methods to implement in their department.

Advanced level participants will further their unclaimed property knowledge by continued networking with their peers, including holders, state representatives and service providers regarding issues affecting their industry and current issues surrounding unclaimed property.

Contact us at uppo@uppo.org or (763) 253-4340 for more information about the conference details or UPPO membership.