



Vertex Exchange CPE Credit Information

Vertex Inc. is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have the 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.nasbaregistry.org.

Delivery Method: All Vertex Exchange sessions are presented live (Group Live). Group Live is defined as *an educational process designed to permit a participant to learn a given subject through interaction with an instructor and other participants either in a classroom or conference setting.*

Prerequisites: Unless specified in the session description, no prerequisites or advance preparation is needed to attend. Those sessions requiring a basic competency or skill will mention it in the session description so you can ensure that you're prepared for the session.

Level: You'll find sessions for every proficiency level - Basic, Intermediate, Advanced, Update or Overview. Use the Content Level filter to select the level of session you're interested in.

Format: Sessions are presented in one of seven formats - Presentation, Panel Discussion, Roundtable, Special Interest Group, Hands-On, Group Learning, and Flash. Please note that Flash sessions do not qualify for CPE credits. Use the Session Format filter to select the type of sessions you're interested in.

Length: Most sessions run 50 or 100 minutes; Flash sessions are 20 minutes long and do not qualify for CPE credits.

Recommended CPE Credit: You can earn one CPE credit for each 50-minute time slot, and two CPE credits for each 100-minute time slot.

Recommended Field of Study: The recommended field of study for all sessions is Taxes – Technical unless otherwise noted on the registration site.

Refunds and Cancellations: The conference cancellation policy is as follows -

- Over 30 days (before September 28) - Full refund
- 14 to 30 days (Between September 28 – October 14) - \$200 penalty
- 14 days or less (After October 14) - No refund

To cancel your registration, contact [Dana Janosek](mailto:dana.janosek@vertexexchange.com) or call +1 866 912 7313 between the hours of 8:00 am to 5:00 pm CDT (2:00 pm - 11:00 pm GMT).

For more information regarding refund, complaint and/or program cancellation policies, please email [Michele McEvoy](mailto:michele.mcevoy@vertexexchange.com), Conference Coordinator, or call +1 484 595 6332 from 8:00 AM - 5:00 PM EDT.