



Policy for Course Credit

In order to receive course credit from The Heritage Institute (towards either Membership or obtaining your Certified Wealth Consultant designation), you must attend and acceptably complete the entire course.

You are responsible for the following:

- *Sign in and out at the beginning and end of each day of these sessions. A THI staff person or your course Mentor will have the Sign-in/Sign-out sheets available everyday;*
- *You must be present at the course at all times (according to the agenda);*
- *You must participate in class discussions and exercises;*
- *You must complete and pass all exercises, homework and exams;*
- *We will provide you with a message phone number and will maintain a message board during all courses. You may use your cell phones at breaks only.*
- *If you miss or fail to pass a portion of a course, you may complete that portion at a future course.*

Upon completion of the course you will receive a certificate stating that you have earned these credits. Due to standards, CPAs must report their credits to their respective state CE CPE departments.



The Heritage Institute, LLC 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 final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Web site: www.nasba.org