

The New Standard for IR Professionals



What You Need to Know to Obtain and Maintain Your IRC Credential



Jennifer Almquist, CPA, IRC Founder, Ivy Street Advisory

Jennifer Almquist has more than 19 years of experience in investor relations, external financial reporting, corporate finance and accounting. In 2010, she founded Ivy Street Advisory, a Denver, Colorado based consulting firm specializing in investor relations, strategic communications, accounting and finance. She previously served as Director of Investor Relations and SEC Reporting for Crocs and served in a variety of investor relations and SEC Reporting roles at various Colorado public companies, including StarTek, TeleTech, Coors and MacDermid.

Mrs. Almquist began her career as an auditor in the Denver office of Deloitte and Touche. She is a Certified Public Accountant in the State of Colorado and an Investor Relations Charter (IRC[®]) holder. She currently serves on the IRC Examination Development Committee, previously served as Vice President and Communications Chair for NIRI's Rocky Mountain Chapter from 2013 to 2017 and was presented with the individual chapter leadership award from NIRI in 2016.

Mrs. Almquist earned a B.S. in Business Administration with an emphasis in accounting from the University of Colorado.



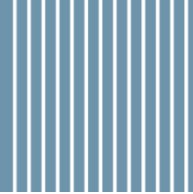
Mitch Haws, IRC Vice President - Investor Relations, Skyworks Solutions

Mitch is a senior investor relations and communications officer with 30 years of global experience in manufacturing, computer services and in the semiconductor industry. He has managed IR and communications through complex financial transactions including IPOs, LBOs, and mergers. Mitch was a member of the inaugural class to receive the IRC certification. He has served in various capacities at NIRI, most recently on the IRC Renewal Committee.

Mitch has a B.A. in Communications from Brigham Young University and an M.B.A. with an emphasis in Finance from Westminster College.



Benchmarks



Over **580** copies of the Body of Knowledge were purchased by IR professionals



76.4%
Passing rate

NIRI has introduced **178** IRC Charter holders



43%
Added IRC to personal LinkedIn profiles

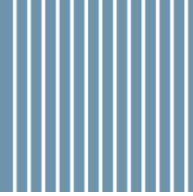


56%
Hold VP title or higher

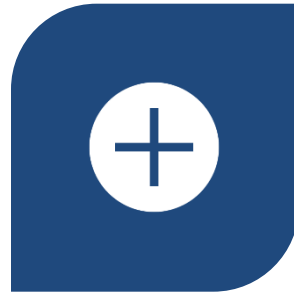
30%
Hold Director or Manager title

IRC is currently represented in over **123** publicly held companies

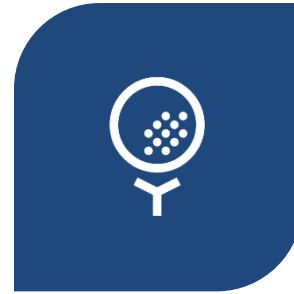
Why Certification



PROFESSIONAL

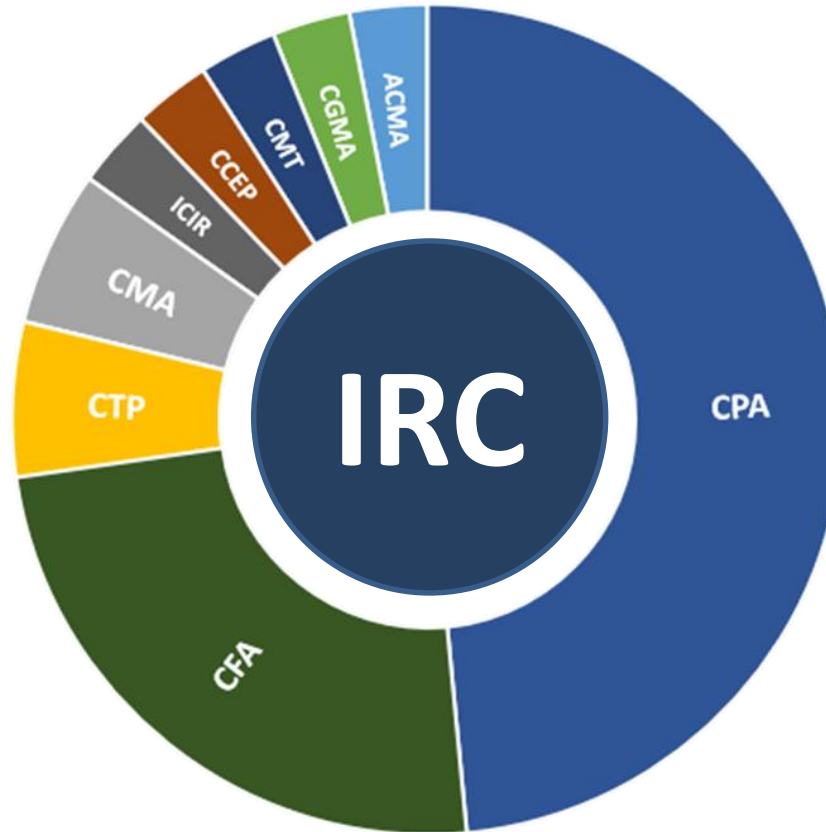
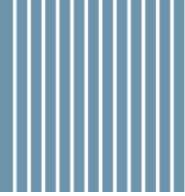


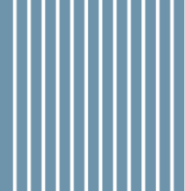
+



PERSONAL

Complementary Certifications





OPTION 1

BA/BS or equivalent, and 3 or more years of qualifying full-time work experience as an IR corporate practitioner or IR counselor

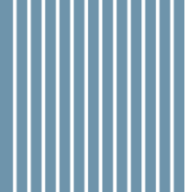
OPTION 2

6 years of qualifying full-time work experience as an IR corporate practitioner or IR counselor

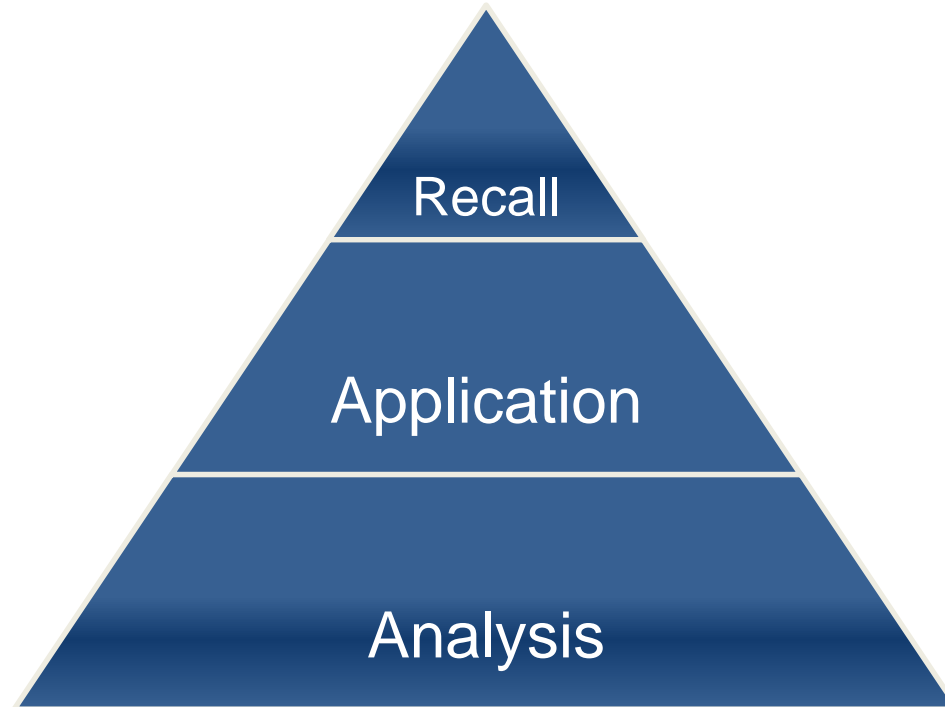
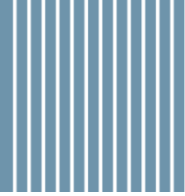
OPTION 3

Hold a current certification relevant to IR practice, with 3 or more years of qualifying full-time work experience as an IR corporate practitioner or IR counselor

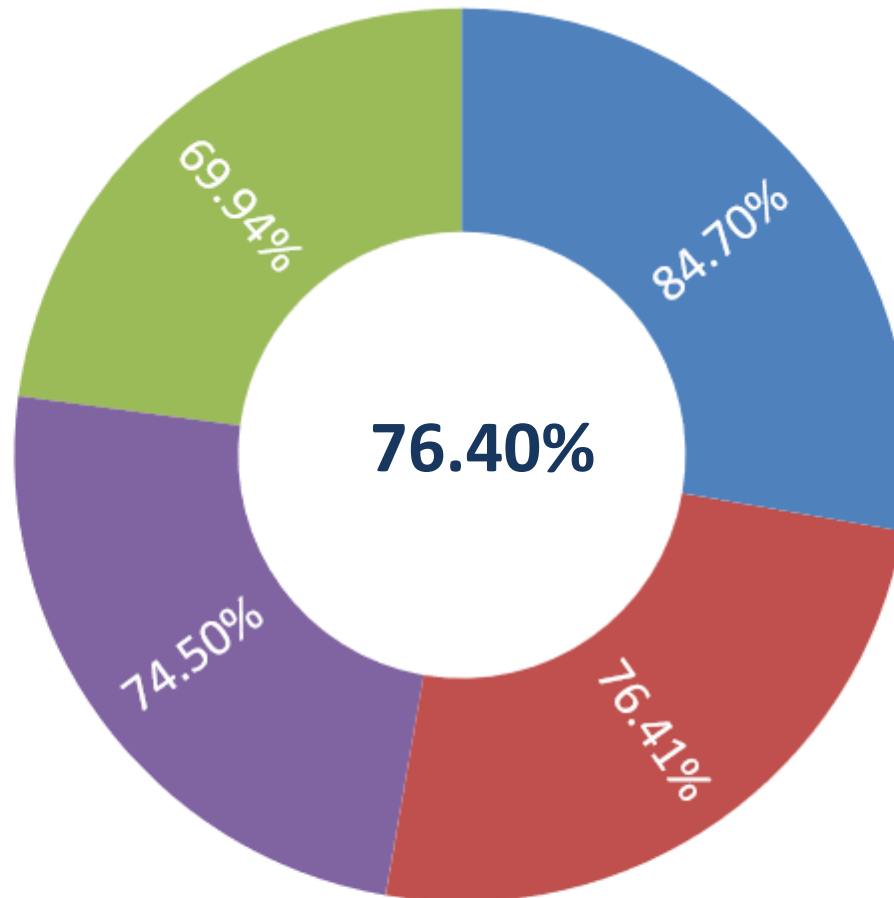
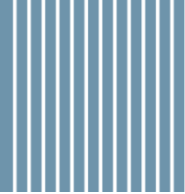
* Work experience requirements: at least 50% of the time should be directly focused on IR activities. Internship is not considered work experience.



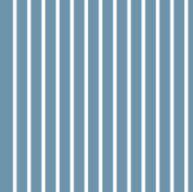
Domains		Percentage of items	Number of items
Domain 1	IR Strategy Formulation	14%	29
Domain 2	IR Planning, Implementation & Measurement	11%	20
Domain 3	Corporate Messaging Development	14%	28
Domain 4	Investor Marketing & Outreach	13%	25
Domain 5	Corporate Financial Reporting & Analysis	11%	24
Domain 6	Business Insight	8%	16
Domain 7	Strategic Counsel & Collaboration	8%	16
Domain 8	Capital Markets & Capital Structure	9%	18
Domain 9	Corporate Regulatory Compliance	6%	12
Domain 10	Corporate Governance	6%	12



Passing Rates

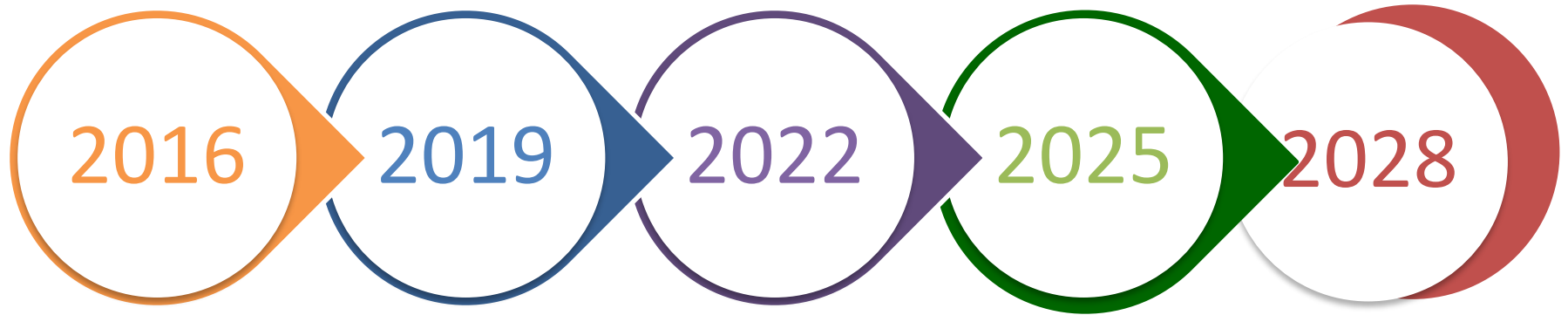
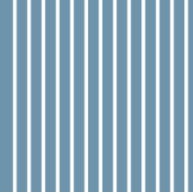


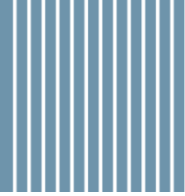
■ 2016 ■ 2017 ■ 2018 ■ 2019



- ROI Toolkit
- IR Competency Suite
- 3 Sample Tests
- Review the IR Competency Framework
- Flag the sections that need revision
- Check the list of References and Bibliography
- Check the online NIRI Resource Libraries
- Create a self-study plan
- Join a study group

A Career-Long Development





Total Minimum Required 30 Professional Development Units (PDUs)

Category I
Professional
Engagement
6+ PDUs

Category II
Education & Skills
Development
15+ PDUs

Category III
Contributing
& Enhancing IR
6+ PDUs

Membership

Authorship

Speaker, presenter,
& panelist

Academic

Professional
education

Skills
development

Self-study

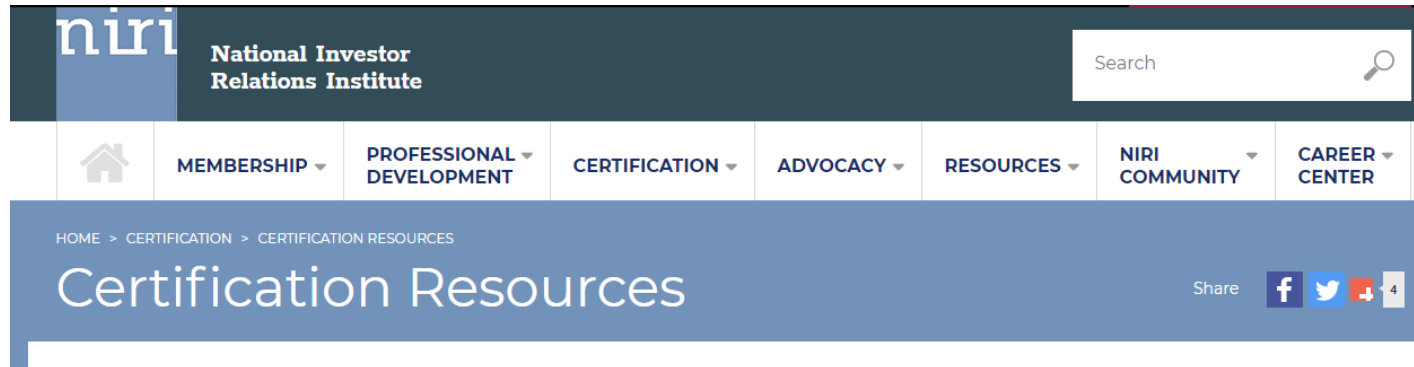
Ethical
education

Coaching &
mentoring

Volunteering

Item writing

Other

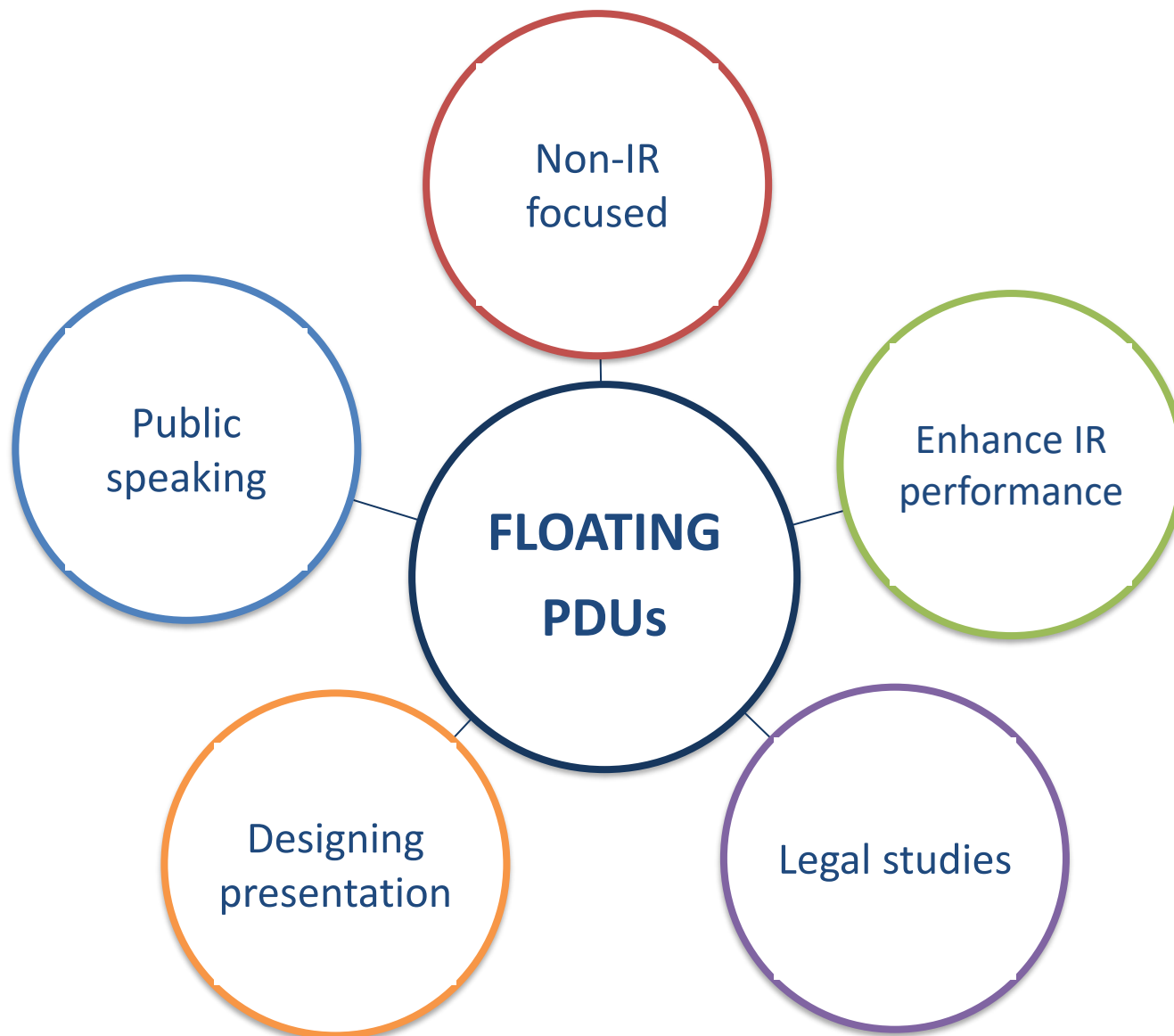
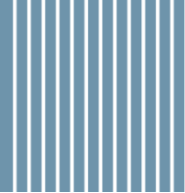


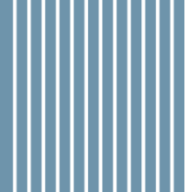
The screenshot shows the top navigation bar of the Niri.org website. It includes the Niri logo, the text 'National Investor Relations Institute', a search bar, and a menu with categories: HOME, MEMBERSHIP, PROFESSIONAL DEVELOPMENT, CERTIFICATION, ADVOCACY, RESOURCES, NIRI COMMUNITY, and CAREER CENTER. Below the navigation bar is a blue banner with the text 'Certification Resources' and social media share icons for Facebook, Twitter, LinkedIn, and a count of 4.

IRC Applications

Niri.org -> Certification
-> View All IRC Resources

- > Authorization To Release Certification Information Form
- > Challenge & Appeal Form
- > Comments Form
- > Complaint & Ethical Claim Form
- > Global IR Societies & Organizations
- > Webinar: How To Maintain Your IRC Credential
- > Webinar: Demystifying the IRC® Credential
- > IR Competency Framework
- > IRC Applicant Handbook
- > IRC Brochure
- > IRC Certification: A Milestone For The IR Profession
- > IRC Experience Verification Form
- > IRC Exam Application
- > IRC Item Submittal Form & Guidelines
- > IRC Renewal Application
- > IRC Renewal Program Handbook
- > IRC ROI Toolkit
- > IRC Sample Test (2016)
- > IRC Sample Test (2018)
- > IRC Sample Test (2019)
- > IRC Testimonials (2016)
- > IRC Testimonials (2018)
- > Mentoring & Coaching Form
- > **NIRI National Volunteer Opportunities**
- > Promoting Your IRC Credential
- > References And Bibliography
- > Sample IRC Renewal Application
- > Special Accommodations Forms
- > Status Change Form
- > Thought Leader Organizations











HOME > NIRI CUSTOMER PORTAL







NIRI Customer Portal

[Home](#) [My Account](#) [Member Directory](#) [Chapter Officers Directory](#) [Upcoming Events](#) [Online Store](#) [Online Surveys](#) [Contact Us](#)

Application Type: IRC Renewal Application
Status: Active
Start Date: 04/20/2017
Close Date: 12/31/2020
Submit Date:

Dashboard  [Renewal Instructions](#)  [CAT I - Professional engagement activities](#)  [CAT II - Education, skills development, self-study](#) 

[CAT III - Enhancing and Contributing to IR](#)  [PDU Supporting Documents](#) 

 Locked  Unlocked  Completed  Under Review  Further Action  Met

REQUIREMENTS

Instructions For Renewal

Before you start the renewal process, please refer to the [Renewal Program Handbook](#) for detailed information and instructions.



Then go to each category to report your Professional Development Units (PDUs). **Submit Application** will appear only when total of 30 PDUs is reported within three year term (certification Start and End date).

www.niri.org -> Log in to Member Center -> My Certification -> My Certifications – Renewal -> Certification Details

Dashboard
Renewal Instructions
CAT I - Professional engagement activities
CAT II - Education, skills development, self-study

CAT III - Enhancing and Contributing to IR
PDU Supporting Documents

Locked Unlocked Completed Under Review Further Action Met

CAT II - Education, skills development, self-study

A. Academics; B. Ethics; C. Annual conferences, symposia, seminars; D. Webinars, professional meetings, presentations, and educational sessions; E. Workshops and hands-on training sessions; F. Self-study and self-paced learning. (A minimum of 15 PDUs is required)

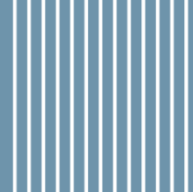
PDU Period - Report here by clicking on REPORT PDU button. (Note: Only PDUs earned within the three-year term (within Start Date and End Date can be claimed and calculated)

StartDate	EndDate	Minimum Required	Reported
04/20/2017	12/31/2020	15.00	3.00

[Summary of ALL reported PDUs](#) REPORT PDU

CreditType	ActivityType	Activity	Activity Date From	Activity Date To	Credit	Reported Date
CAT II - Education, skills dev. and self-study	Event	Preparing for CEO Pay Ratio Disclosure	02/01/2018	02/01/2018	1.00	04/18/2019
CAT II - Education, skills dev. and self-	Event	Passive/Index Investment Trends and Their Impact on	04/19/2018	04/19/2018	1.00	04/18/2019

Reporting PDUs (Continued)



[Home](#) [My Account](#) [Member Directory](#) [Chapter Officers Directory](#) [Upcoming Events](#) [Online Store](#) [Online Surveys](#) [Contact Us](#)

IRC Report PDU Credits | [Report PDU](#)

Activity Information

Credit type:

Required


Provider/Sponsor:


Required

Activity Name:

Number of credits:

Required

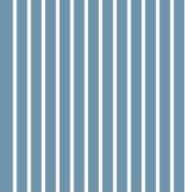
Activity date from: 

Activity date to: 

Required

Activity Details:

Required



Private This credential is only visible to you when you are signed in

Investor Relations Charter (IRC®)



Issued to
Credential Holder

Issued by
National Investor Relations Institute

Verified Issuer



Issued on
January 1, 2018

Description

Description

The Investor Relations Charter (IRC®) is the only U.S. based certification program for the investor relations specialty field of practice.

Offered by the largest professional investor relations association in the world, the National Investor Relations Institute (NIRI®) is dedicated to advancing the practice of investor relations and the professional competency and stature of its members who represent over 1,200 publicly held companies and \$9 trillion in stock market capitalization.

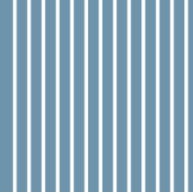
The IRC assures those in the corporate, agency, and investment communities that the charter holder has demonstrated the necessary knowledge and skills for competence across the investor relations discipline.

[View more information...](#)

Skills / Knowledge

- Investor Relations Strategy Formulation;
- Investor Relations Planning, Implementation and Measurement;
- Corporate Messaging Development; Investor Marketing and Outreach;
- Corporate Financial Reporting and Analysis; Business Insight;
- Strategic Counsel and Collaboration; Capital Markets and Capital Structure;
- Corporate Regulatory Compliance; Corporate Governance.

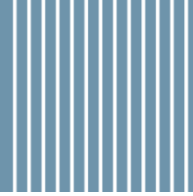
Blockchain Secured [Verify blockchain record](#)



- Initial Application Deadline: September 21
 - Final Application Deadline: October 19

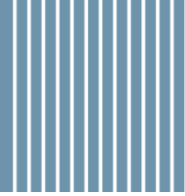
Testing Window: November 16 – 23, 2019

Questions?



- Initial Application Deadline: September 21
 - Final Application Deadline: October 19

Testing Window: November 16 – 23, 2019



HOME > PROFESSIONAL DEVELOPMENT > IR COMPETENCY SUITE

IR Competency Suite

Share

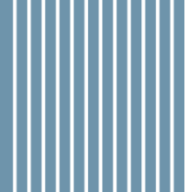
Learning for Your Whole Team

Contact us at prodev@niri.org if you would like to discuss purchasing the IR Competency Suite for your team.

Introducing the IR Competency Suite™



On-Demand Learning Series
Coming Soon in 2019!



www.niri.org/certification