

# The New Standard for IR Professionals



## New Guidelines to Maintain your IRC Certification



NIRI 2020

[www.niri.org](http://www.niri.org)



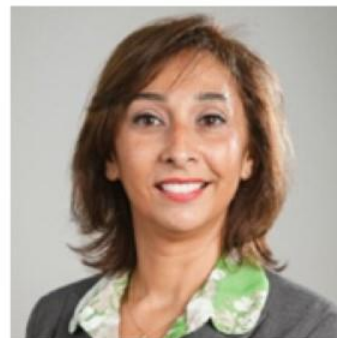
The information shared during this webinar is for informational purposes only within the NIRI community.



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During today's webinar you will learn about:

- The value of certification
- The revised guidelines to maintain your certification

## **Scope:**

Certification of personnel with fundamental knowledge and skills in the role of investor relations professionals.

## **Objectives** of NIRI's IRC Charter program

- (1) Validate** the IR professional's fundamental knowledge and comprehension of the core tenets of investor relations
- (2) Verify** the IR professional's ability to apply the underlying principles and synthesize the strategic concepts related to the practice of investor relations.





Over **615** copies  
of the Body of Knowledge were  
purchased by IR professionals



**76%**

Passing rate

NIRI has introduced  
**192**  
IRC Charter holders



**48%**

Added IRC to personal  
LinkedIn profiles



**59%**

Hold VP title or  
higher

**25%**

Hold Director or  
Manager title



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

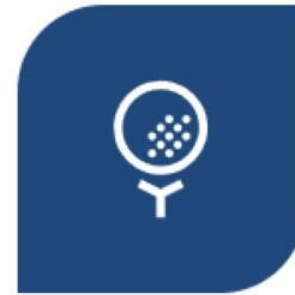
## PERSONAL CHOICE, PROFESSIONAL PRIDE!



**PROFESSIONAL**

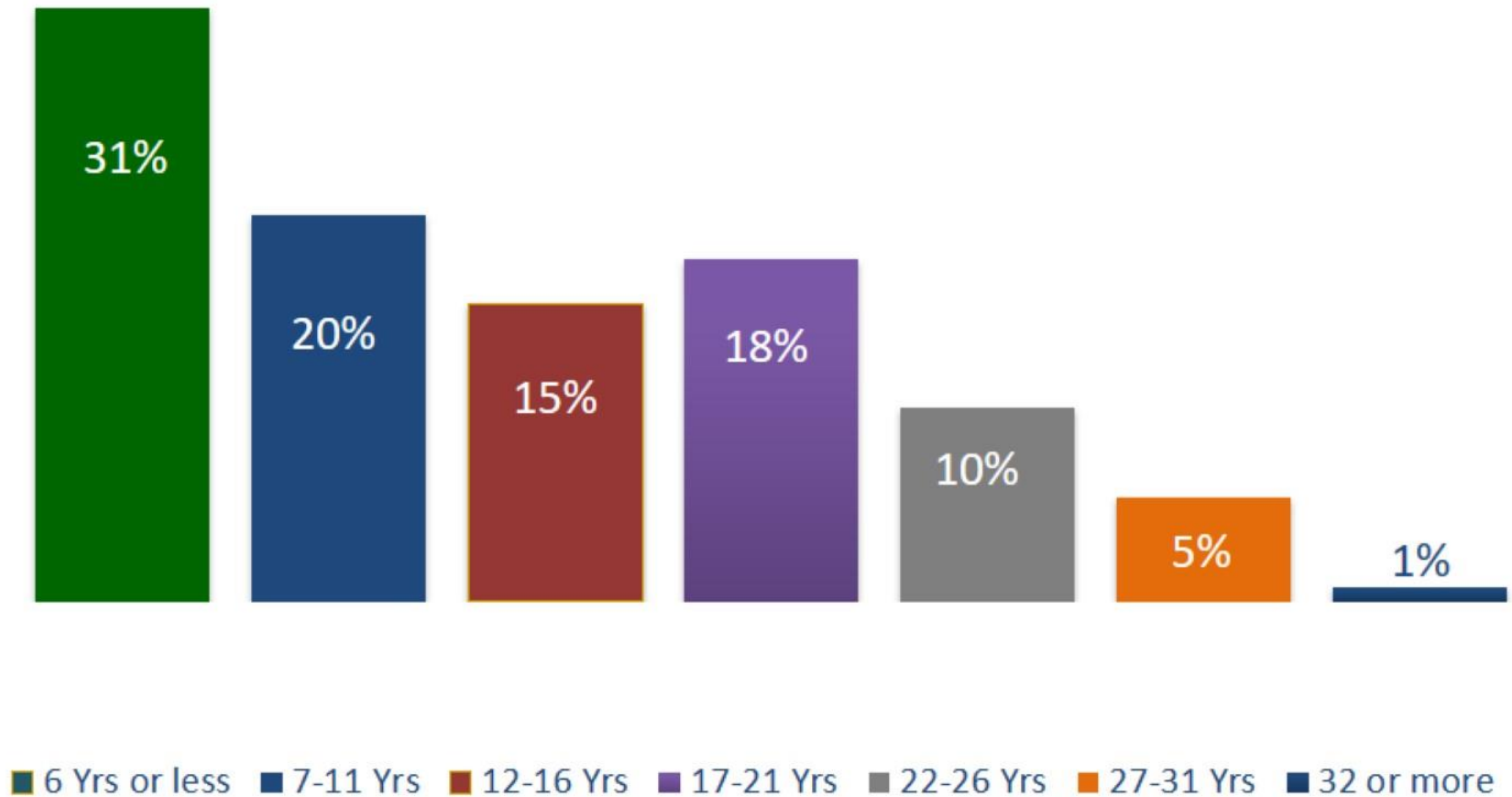


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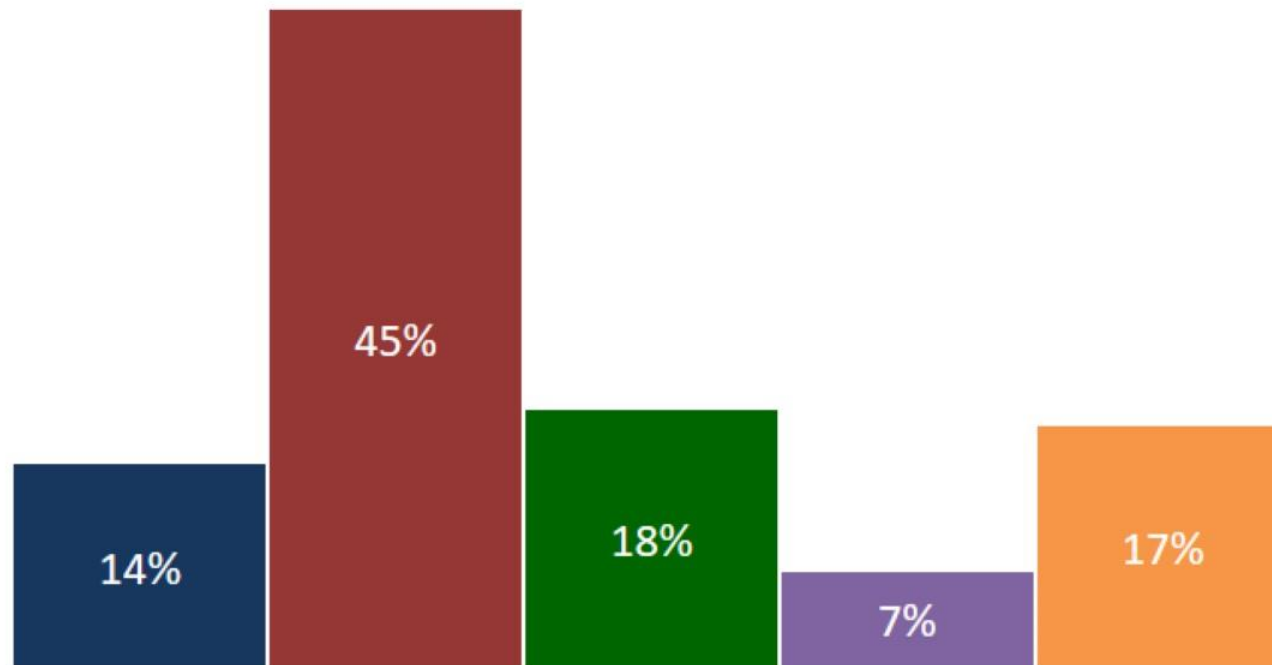
**PERSONAL**

# Who Is Currently Certified





# Who is Currently Certified



■ CEO/President/Counselor ■ VP/Sr VP/IRO ■ Director/Sr. Dir  
■ Manager/Sr. Mgr ■ Other/Unidentified

## 2019/2020 Education and Credentials



78% hold MBA Degree

25% hold MS/MA Degree



26% hold CFA Credentials

34% hold CPA Credentials

28% hold IRC Credentials

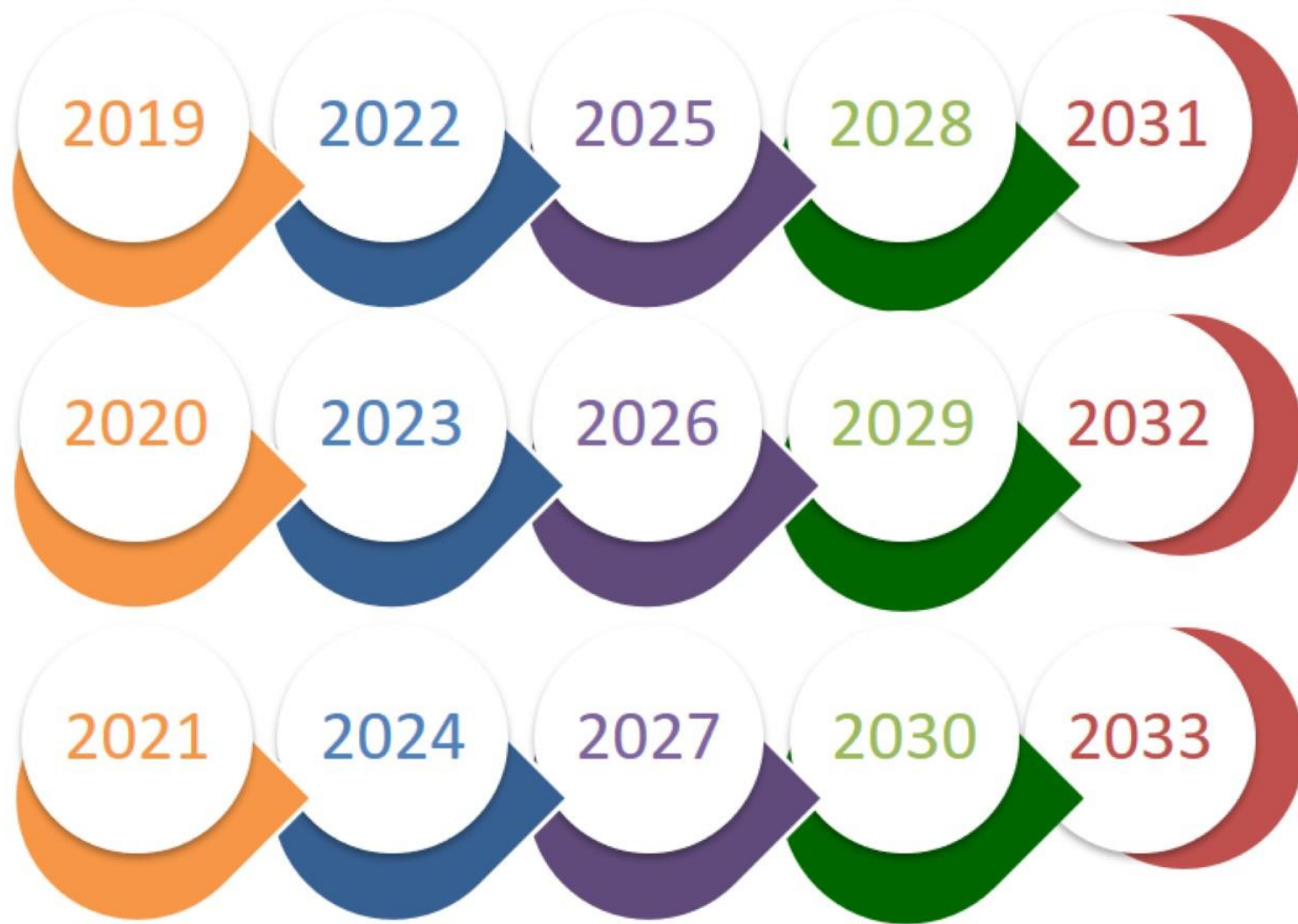
These percentages reflect the responses of all participants.

## PERSONAL CHOICE, PROFESSIONAL PRIDE!

- Credibility
- Marketability & mobility
- Leadership
- Self satisfaction
- Path to success
- Global recognition and portability
- Personal and professional development



# A Career-Long Development



- ✓ 3-Year Renewal Cycle
- ✓ 30 PDUs per Renewal Cycle
  - All in one or in a combination of categories
- ✓ 3 Categories:
  - Professional Engagement
  - Education and Skills Development
  - Contributing & Enhancing IR

~~X Minimum PDU per Category~~



## Total Minimum Required 30 Professional Development Units (PDUs)

**Category I**  
Professional  
Engagement

Membership

Authorship

Speaker, presenter,  
& panelist

**Category II**  
Education & Skills  
Development

Academic

Professional  
education

Skills  
development

Self-study

Ethical  
education

**Category III**  
Contributing  
& Enhancing IR

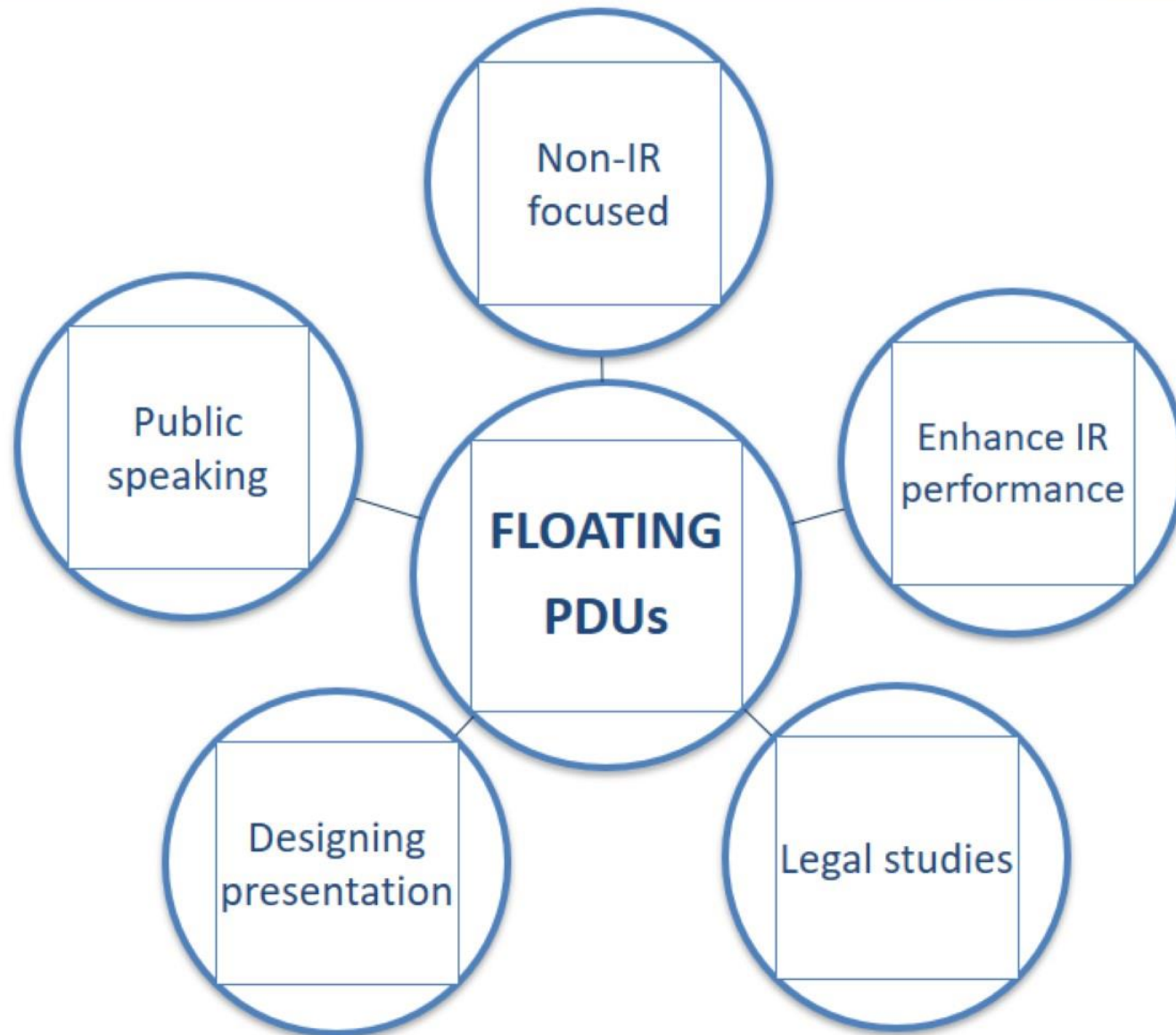
Coaching &  
mentoring

Volunteering

Item writing

Other





Here is how to self-report your PDUs

- Log into [www.niri.org](http://www.niri.org) and click on **My Account** tab
- Click on the **My Certification** link
- Click on **Certification Details**
- Click on **Report PDU** button
- Add the required information
- Submit Application

## 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:**


**SUBMIT APPLICATION**

[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

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

# Reporting PDUs

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)

<b>StartDate</b>	<b>EndDate</b>	<b>Reported</b>
04/20/2017	12/31/2020	37.00

## Summary of ALL reported PDUs

**REPORT PDU**

CreditType	ActivityType	Activity	Activity Date From	Activity Date To	Credit	Reported Date
CAT I - Professional engagement activities	Self Reported	NIRI: NIRI membership	01/01/2017	01/01/2017	4.00	11/10/2019
CAT I - Professional engagement activities	Self Reported	NIRI: Panel moderator	06/03/2019	06/03/2019	1.00	11/10/2019
CAT I - Professional engagement activities	Self Reported	NIRI: Panel moderator	06/04/2017	06/04/2017	1.00	11/10/2019
CAT I - Professional engagement activities	Self Reported	Citibank: Speaker at Citi IR Academy	09/27/2019	09/27/2019	1.00	11/10/2019
CAT I - Professional engagement activities	Event	Investor Days: Expertise, Strategies, and Tactics to Maximize Your ROI	10/04/2018	10/04/2018	0.00	04/18/2019
CAT II - Education, skills dev. and self-study	Event	Compensation Trends for Corporate IR Practitioners in 2020	02/20/2020	02/20/2020	1.00	03/01/2020

My certification expired. Now what?

**Retired Status → IRC-R**



**Emeritus Status → IRC-E**

Use the IRC Designation:

- After your Name
- Email Signature
- Business Cards
- Resume, CV & Biography



**Command a Premium as an IR Professional**

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](#)

- Strengthen your professional brand.
- Leverage your credentials because certifications are the new currency.
- Show it off! Post your digital badge on your online profiles.





I CAN'T  
KEEP  
CALM  
BECAUSE  
I AM A  
CERTIFIED  
IR  
PROFESSIONAL

**irc** INVESTOR  
RELATIONS  
CHARTER®

[www.niri.org/certification](http://www.niri.org/certification)