New Guidelines to Earn the IRC Certification
The information shared during this webinar is for informational purposes only within the NIRI community. It is not a guarantee to pass the IRC examination or to earn the IRC certification.
Discussion Leaders

Mark Donohue, IRC
VP, Investor Relations
*Clarivate Analytics*
NIRI Fellow
Chair, NIRI Certification Council

Tabitha Zane
VP, Investor Relations
*TopBuild, Corp.*
NIRI Fellow
Member, NIRI Certification Council
Objectives

During today’s webinar you will learn about:

• The value of earning a credential
• The revised guidelines to:
  o Sit for the exam
  o Earn the IRC 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.
Benchmarks

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

IRC is represented in 8 countries & on 4 continents

59% Hold VP title or higher

25% Hold Director or Manager title

IRC is currently represented in over 123 publicly held companies
Why Certification?

PERSONAL CHOICE, PROFESSIONAL PRIDE!

PROFESSIONAL + PERSONAL
Why IRC?

- Validation
- Evolution
- Leadership
- Self satisfaction
- Mobility
- Global recognition and portability
Digital Engagement

Investor Relations Charter (IRC®)

Issued to: Credential Holder
Issued by: National Investor Relations Institute
Issued on: January 1, 2018

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
Who Is Currently Certified?

- 31% 6 Yrs or less
- 20% 7-11 Yrs
- 15% 12-16 Yrs
- 18% 17-21 Yrs
- 10% 22-26 Yrs
- 5% 27-31 Yrs
- 1% 32 or more
Who is Currently Certified

- CEO/President/Counselor: 14%
- VP/Sr VP/IRO: 45%
- Manager/Sr. Mgr: 18%
- Director/Sr. Dir: 7%
- Other/Unidentified: 17%
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.
Option 1: Apply for Full Certification

If you have already:

• Met the education and experience options (see below)
• Achieved experience in 7/10 IR domains

OPTION 1: U.S. bachelor’s degree or equivalent with three or more years of qualifying full-time work experience as an IR corporate professional or IR counselor.

OPTION 2: Six years of qualifying full-time work experience as an IR corporate professional or IR counselor.

OPTION 3: Hold a current certification relevant to IR practice with three or more years of qualifying full-time work experience as an IR corporate professional or IR counselor.
How to Apply

Option 2: Candidate Status  NEW

Great choice if you do not meet the full eligibility requirements
• Less than 3 years of IR experience
• Transitioning to IR
• Less than 50% of your responsibilities are IR focused

Requirements:
To sit for the exam as an IRC candidate you must be:
• IR practitioner
• IR counselor
• IR service provider
• Capital markets professional

You have four years to meet the minimum eligibility requirements and be awarded full certification.
How To Prepare

- Review the IR Competency Framework
- Flag the sections that need revision
- Check the list of References and Bibliography
- Check the online NIRI Resources
- Create a self-study plan
- Join a study group where available
Certification Resources

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
- Status Change Form
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Apply Today!

Spring Testing: June 20 - 27
Fall Testing: November 13 – 20
Final Thoughts

- Strengthen and leverage your professional brand
- Demonstrate your investor relations knowledge and experience
- Enhance your standing within your organization
- Get a leg up on your competition

**Certifications are the new currency!**
www.niri.org/certification