

The New Standard for IR Professionals



irc INVESTOR
RELATIONS
CHARTER®



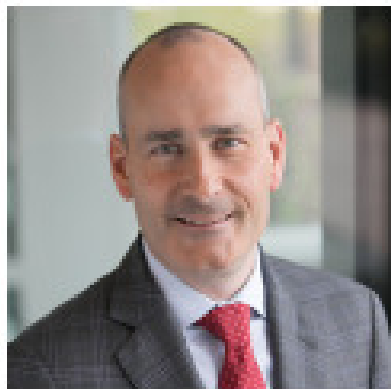
New Guidelines to Earn the IRC Certification

NIRI 2020

www.niri.org
niri

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



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During today's webinar you will learn about:

- The value of earning a credential
- The revised guidelines to:
 - Sit for the exam
 - 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

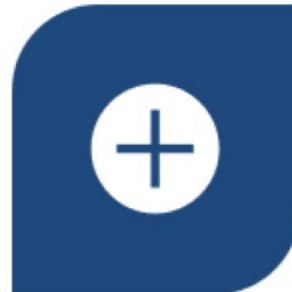
Why Certification?



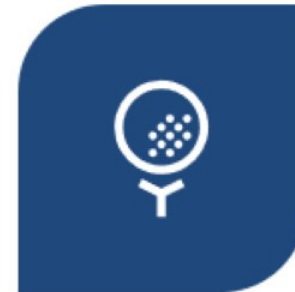
PERSONAL CHOICE, PROFESSIONAL PRIDE!



PROFESSIONAL



+



PERSONAL

Why IRC?



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



Digital Engagement



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.

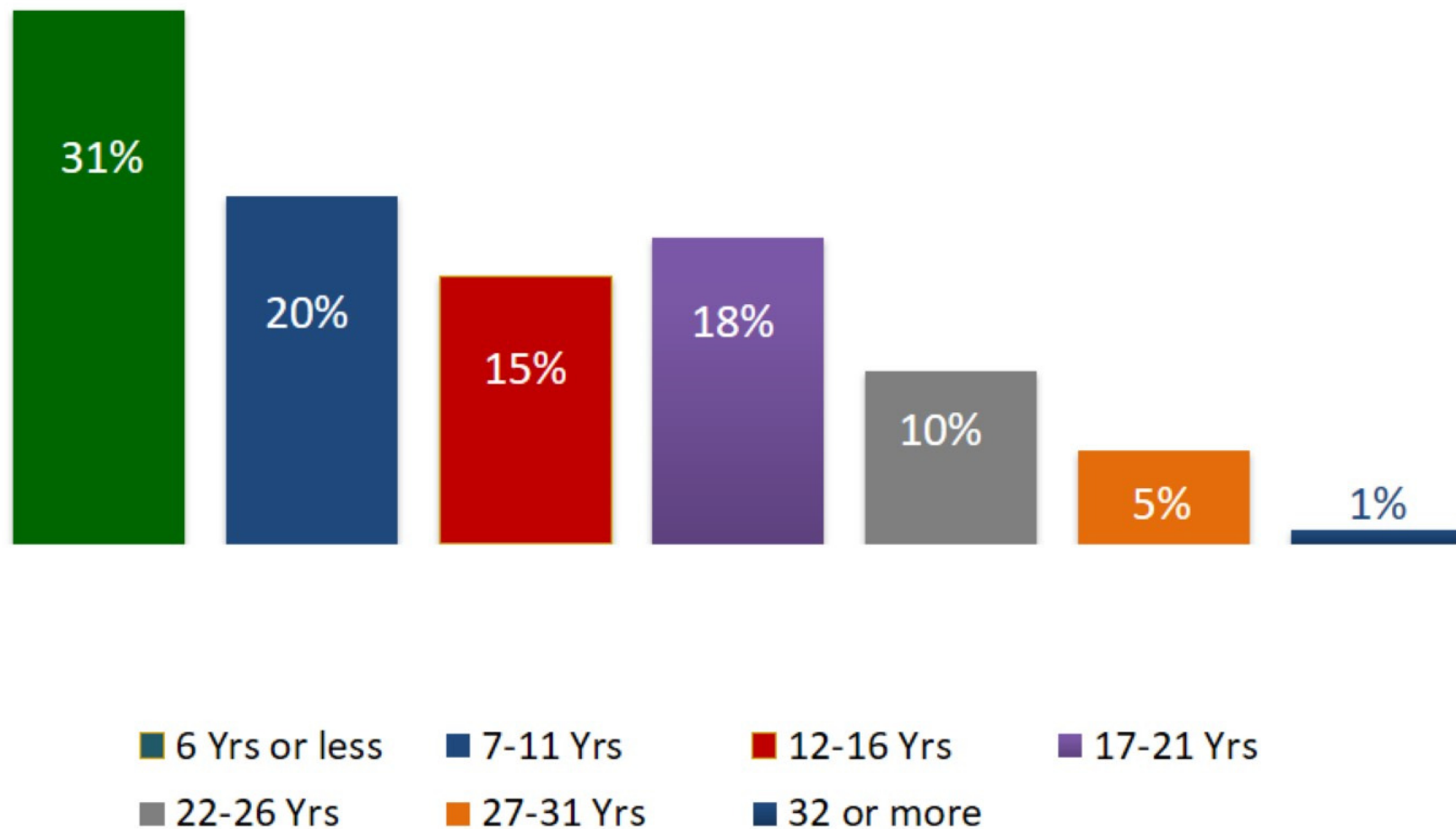
[View more information...](#)

Skills / Knowledge

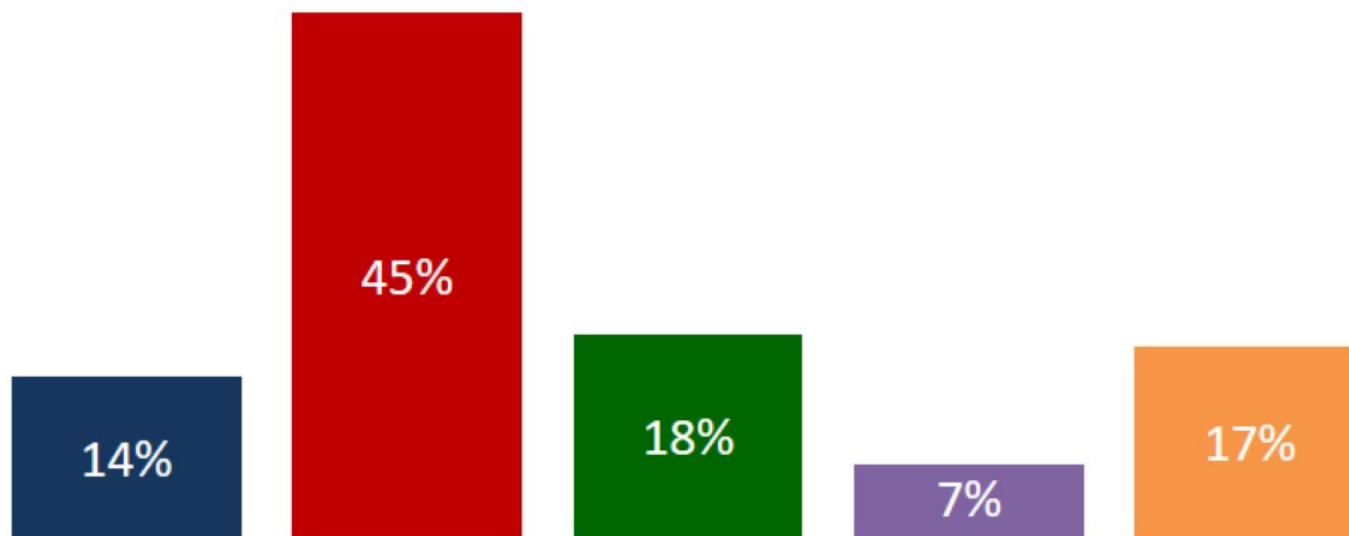
- Investor Relations Strategy Formulation;
- Investor Relations Planning, Implementation and Measurement;
- Corporate Messaging Development; Investor Marketing and Outreach;
- Corporate Financial Reporting and Analysis; Business Insight;
- Strategic Counsel and Collaboration; Capital Markets and Capital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

Blockchain Secured [Verify blockchain record](#)

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.

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.

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.

- 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

National Investor Relations Institute

Search



MEMBERSHIP

PROFESSIONAL DEVELOPMENT

CERTIFICATION

ADVOCACY

RESOURCES

NIRI COMMUNITY

CAREER CENTER

HOME > CERTIFICATION > CERTIFICATION RESOURCES

Certification Resources

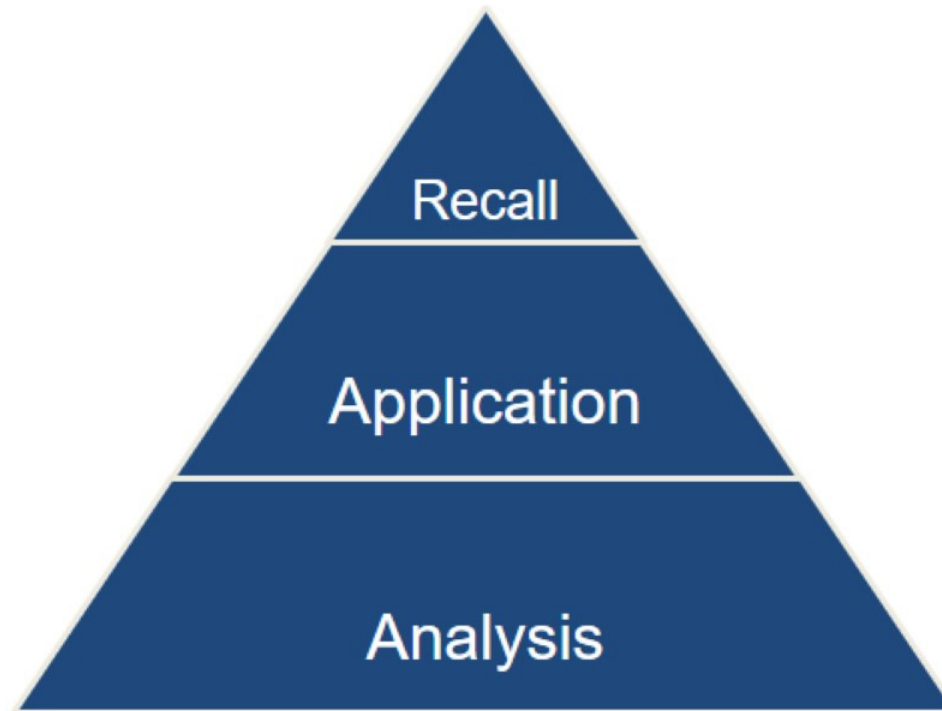
Share



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 Form
- > Status Change Form

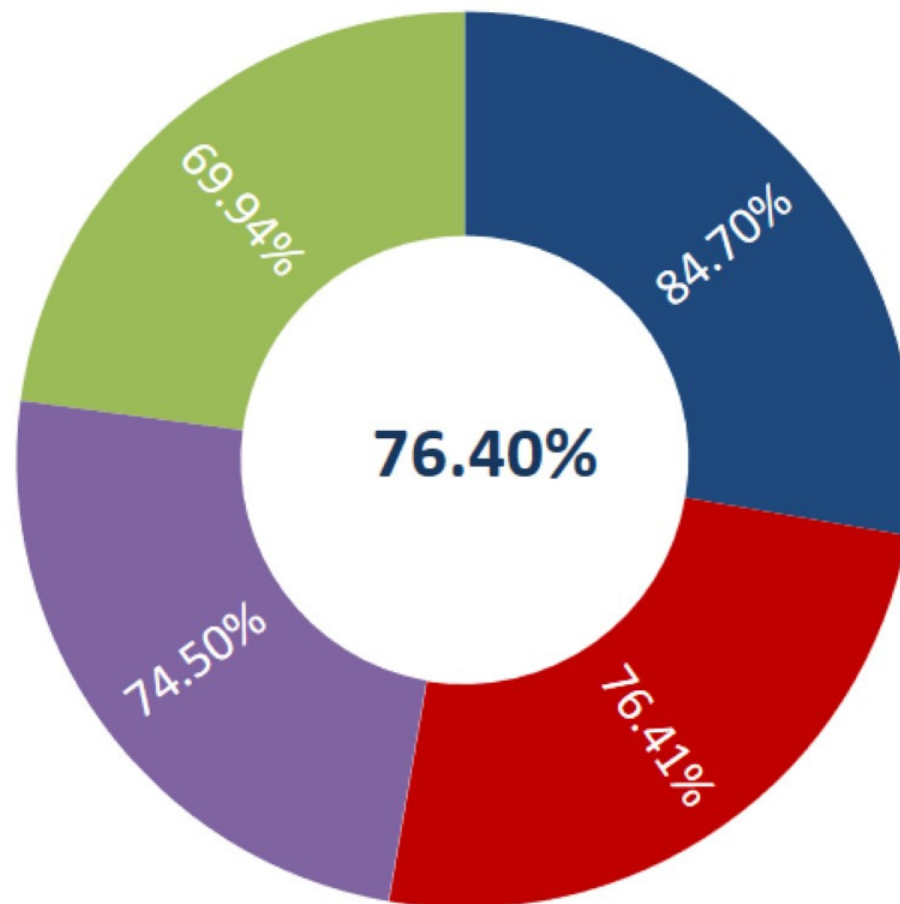


Exam Blueprint



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

Success Rate



■ 2016 ■ 2017 ■ 2018 ■ 2019

Apply Today!



Spring Testing: June 20 - 27

Fall Testing: November 13 – 20



A Career-Long Development



- 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!

A large, centered version of the IIRC logo. The lowercase letters "irc" are in a very bold, dark blue font. To the right of "irc", the words "INVESTOR RELATIONS CHARTER" are stacked vertically in a smaller, all-caps, dark blue font. A registered trademark symbol (®) is positioned at the end of the word "CHARTER".

irc INVESTOR
RELATIONS
CHARTER®

www.niri.org/certification