New Guidelines to Maintain your IRC Certification
The information shared during this webinar is for informational purposes only within the NIRI community.
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

Iman Hannon, CM
Director of Governance, Leadership
Services & Certification
*NIRI*
Objective

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.
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

IRC is currently represented in over 123 publicly held companies

25% Hold Director or Manager title
PERSONAL CHOICE, PROFESSIONAL PRIDE!

PROFESSIONAL + PERSONAL
Who is Currently Certified

- CEO/President/Counselor: 14%
- VP/Sr VP/IRO: 45%
- Director/Sr. Dir: 17%
- Manager/Sr. Mgr: 7%
- Other/Unidentified: 18%
2019/2020 Education and Credentials

78% hold MBA Degree
26% hold CFA Credentials
25% hold MS/MA Degree
34% hold CPA Credentials
28% hold IRC Credentials

These percentages reflect the responses of all participants.
Why Maintain Your Certification

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
Active Status

- 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
At-A-Glance

Total Minimum Required
30 Professional Development Units (PDUs)

**Category I**
Professional Engagement

**Category II**
Education & Skills Development

**Category III**
Contributing & Enhancing IR

Membership
Authorship
Speaker, presenter, & panelist

Academic
Professional education
Skills development
Self-study
Ethical education

Coaching & mentoring
Volunteering
Item writing
Other
Floating PDUs

Non-IR focused

Public speaking

Designing presentation

Enhance IR performance

Legal studies
Self-Reporting PDUs

Here is how to self-report your PDUs

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

[Submit Application]

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)

<table>
<thead>
<tr>
<th>CreditType</th>
<th>ActivityType</th>
<th>Activity</th>
<th>Activity Date From</th>
<th>Activity Date To</th>
<th>Credit</th>
<th>Reported Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAT I - Professional engagement</td>
<td>Self</td>
<td>NIRI: NIRI membership</td>
<td>01/01/2017</td>
<td>01/01/2017</td>
<td>4.00</td>
<td>11/10/2019</td>
</tr>
<tr>
<td></td>
<td>Self</td>
<td>NIRI: Panel moderator</td>
<td>06/03/2019</td>
<td>06/03/2019</td>
<td>1.00</td>
<td>11/10/2019</td>
</tr>
<tr>
<td></td>
<td>Self</td>
<td>NIRI: Panel moderator</td>
<td>06/04/2017</td>
<td>06/04/2017</td>
<td>1.00</td>
<td>11/10/2019</td>
</tr>
<tr>
<td></td>
<td>Self</td>
<td>Citibank: Speaker at Citi IR Academy</td>
<td>09/27/2019</td>
<td>09/27/2019</td>
<td>1.00</td>
<td>11/10/2019</td>
</tr>
<tr>
<td></td>
<td>Event</td>
<td>Investor Days: Expertise, Strategies, and Tactics to Maximize Your ROI</td>
<td>10/04/2018</td>
<td>10/04/2018</td>
<td>0.00</td>
<td>04/18/2019</td>
</tr>
<tr>
<td></td>
<td>Event</td>
<td>Compensation Trends for Corporate IR Practitioners in 2020</td>
<td>02/20/2020</td>
<td>02/20/2020</td>
<td>1.00</td>
<td>03/01/2020</td>
</tr>
</tbody>
</table>
My certification expired. Now what?
Retired Status → IRC-R
Emeritus Status $\rightarrow$ IRC-E
Advertise Your Achievement

Use the IRC Designation:

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

Command a Premium as an IR Professional
Digital Engagement

Investor Relations Charter (IRC®)

Issued to: Credential Holder
Issued by: National Investor Relations Institute
Verified Issuer

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;
- Corporate Financial Reporting and Analysis;
- Corporate Regulatory Compliance;
- Investor Marketing and Outreach;
- Business Insight;
- Capital Markets and Capital Structure;
- Strategic Counsel and Collaboration;
- Corporate Governance.

Blockchain Secured
Verify blockchain record
Take Aways

• 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