**Certified Independent Professional Municipal Advisor**

**Designation Form**

**The CIPMA program is an initiative of the National Association of Municipal Advisors, intended for practicing municipal advisors and support staff within NAMA Member Firms, to showcase those individuals who are committed to exceed industry standards related to MA continuing education requirements and professional codes of conduct. The program is designed by NAMA to provide MAs with an enhanced educational experience and professional standards to best meet their fiduciary duty to clients.**

**Individuals must meet the standards set in the CIPMA Program to obtain the CIPMA status (**<https://www.municipaladvisors.org/assets/CIPMAOVERVIEW.pdf>)**. This includes acquiring twelve hours of continuing education in the previous calendar year, affirming that other program criteria are met, and submitting this form to NAMA’s office.**

Name: *complete here*

Firm: *complete here*

Address: *complete here*

Email: *complete here*

Phone: *complete here*

**Please confirm that the following statements are true with your signature below:**

* You have been with the MA Firm where you are employed for more than two years, and work at least 75% of the time as a professional employee.
* You have performed MA services or firm supportive services for municipal entities or obligated persons for at least two years.
* You have a Bachelor’s degree or have been engaged in a professional capacity in the field of public finance for at least six years.
* You will abide by your Firm’s or NAMA’s Code of Conduct or Ethics.

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Signature Date

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**Earned Continuing Education Credits**

Below please list the twelve continuing education credits that you obtained in 2023. Attach documentation to this form noting participation in the training/education. NAMA’s CIPMA Program Description includes a list of eligible education and training efforts that may be used for the program (visit - <https://www.municipaladvisors.org/assets/CIPMAOVERVIEW.pdf>). Documentation of completed training/education can include: a registration receipt to a webinar or training, notification of NASBA approved CPE credits, or a statement from the firm representative or firm CCO for in-house or other training authorized by the firm.

**Number of Hours Training/Education Description**

*Complete here and continue to new page if needed*

Below have your Firm’s NAMA Firm Designee sign the earned continuing education form prior to submission.

The form and corresponding documentation must be emailed to [nama@municipaladvisors.org](mailto:nama@municipaladvisors.org) - subject line: CIPMA 2023) by March 15, 2024. Documentation may also be mailed - to NAMA’s offices (19900 MacArthur Blvd, Suite 1100, Irvine, CA 92612) If you have any questions, contact Susan Gaffney at [nama@municipaladvisors.org](mailto:nama@municipaladvisors.org). NAMA will work with Member Firms to process multiple applications if so desired.

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Firm Designee Signature or CCO Date