

# CIRI/Ivey

## Investor Relations Certification Program & Certified Professional in Investor Relations (CPIR) Designation



### Get the IR Edge by becoming a CPIR

- › Enhance your knowledge of investor relations
- › Be recognized by your peers and others in the investor relations community
- › Improve your opportunities for career advancement and greater compensation

Enroll now for North America's first and only investor relations certification program at [www.ciri.org](http://www.ciri.org)

“The role of investor relations has evolved significantly becoming more strategic and not just tactical. It is important for CIRI to offer professional development opportunities that enable IROs to excel in this changing environment by having strong knowledge across the array of areas requiring expertise.”

**John Wheeler**

Certification Curriculum Committee member  
and Vice President, Investor Relations of  
TELUS Corporation

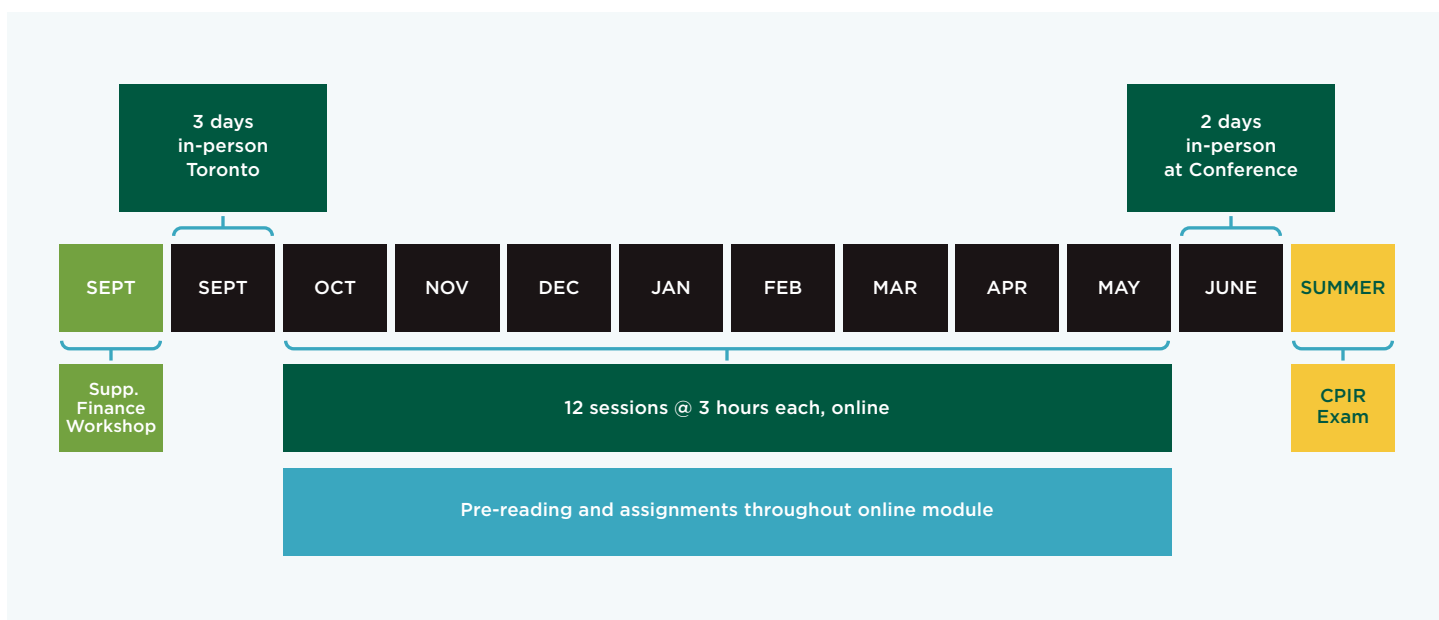
# CIRI/Ivey Investor Relations Certification Program & Certified Professional in Investor Relations (CPIR) Designation

## Program Overview

Recognizing that there is a need for formal education in the field of investor relations, CIRI has partnered with the Richard Ivey School of Business (Ivey) to develop a rigorous program that will cover all relevant areas of this multi-disciplinary role including capital markets, corporate governance, securities law, finance, communications and marketing. This initiative supports CIRI's mandate to contribute to the transparency and integrity of the Canadian capital market by advancing the practice of investor relations, the professional competency of its members, and the stature of the profession.

The program is delivered through a combination of in-person and online classes. It starts with three days in-person in Toronto, followed by 12 online classes spanning eight months, and finishing with two days in-person at CIRI's Annual Investor Relations Conference location. A limited number of spaces are available.

A supplemental one-day accounting and finance basics workshop will precede the first in-person session. This workshop is recommended for participants who do not have a financial background or need to refresh their skills.



## Ivey - A Solid Partner

**IVEY**

Ivey is Canada's leading provider of relevant, innovative and comprehensive business education. Drawing on extensive research and business experience, Ivey faculty provide the best classroom experience, equipping graduates with the skills and capabilities they need to tackle the leadership challenges in today's complex business world.

## Who Should Attend

This program is intended for experienced investor relations professionals working for or advising publically listed companies, individuals working closely with investor relations professionals, and individuals who have corporate experience in a related field and are interested in gaining a solid understanding of the investor relations role.

“...a rigorous program that will cover all relevant areas of this multi-disciplinary role...”

## Program Requirements

To participate in this program you must have:

- at least three years of investor relations experience\* or
- four years of related corporate experience and have participated in CIRI's Essentials of Investor Relations program within the past five years or
- four years of combined experience in investor relations\* and a related field and have participated in CIRI's Essentials of Investor Relations program within the past five years.

All applicants are required to submit two professional reference letters, one of which is from your current employer.

*\*where 50% or more of your time was spent on investor relations*

## Prerequisites

Applicants who do not have three years of investor relations experience must participate in CIRI's Essentials of Investor Relations program prior to commencing the certification program. If the applicant has participated in this program in the past five years, this is not necessary.

## Program Fees

The fee to complete the program is \$8,950 for CIRI members and \$9,450 for non-members.

Program fees include program registration; program materials and resources; and breakfasts and lunches for the in-person program days.

The supplemental one-day finance workshop is at an additional cost.

Applications are considered on a first come, first served basis. Ivey must be notified in writing of all cancellations. If you are admitted to a program, but find that you are unable to attend, you have the following cancellation options:

- **Up to 45 days before program start:** You receive a full refund of the program fee.
- **From 45 days up to 16 days before program start:** You incur a 50% cancellation fee.
- **Within 15 days of program start:** You incur a 100% cancellation fee.

## Becoming Certified

Individuals who complete the CIRI/Ivey Investor Relations Certification Program must write the Certified Professional in Investor Relations (CPIR) exam to become certified. The CPIR exam must be written within two years of completing the Program and individuals will have two opportunities to successfully complete the CPIR exam.

To achieve the CPIR designation you must:

- have at least three years of investor relations experience\* or have four years of related corporate experience and have participated in CIRI's Essentials of Investor Relations program within the past five years or have four years of combined experience in investor relations\* and a related field and have participated in CIRI's Essentials of Investor Relations program within the past five years;
- submit two professional reference letters, one of which is from your current employer;
- complete the CIRI/Ivey Investor Relations Certification Program;
- successfully pass the CPIR exam;
- be a member of CIRI; and
- agree to comply with CIRI's Code of Ethics.

*\*where 50% or more of your time was spent on investor relations*

## Term of Certification

The CPIR designation is valid for one year from the date of issuance. Should you require an extension to complete the renewal requirements due to extenuating circumstances, a written request must be forwarded to the Certification Governance Committee for consideration.

## Maintaining the Certification

In order to maintain your CPIR designation, you must complete a specified amount of continuing education units annually, maintain your membership in CIRI and agree to comply with CIRI's Code of Ethics.

**The Belle Mulligan Scholarship will be awarded annually to one deserving individual for participation in the CIRI/Ivey Investor Relations Certification Program and CPIR exam.** Visit [www.ciri.org](http://www.ciri.org) for details.

# CIRI/Ivey Investor Relations Certification Program & Certified Professional in Investor Relations (CPIR) Designation

## Faculty

Steve Foerster, Finance & Faculty Director  
Jeffrey Gandz, Ethics  
Carol Hansell, Regulations  
Darren Meister, Social Media  
Fernando Olivera, Negotiations  
Rick Robertson, Accounting  
Glenn Rowe, Strategy  
Michael Sider, Communications  
Matt Thomson, Brand Management

## Certification Curriculum Committee

David Carey, Senior Vice President, Capital Markets,  
ARC Resources & Chair, CIRI National Board

Tom Enright, President & CEO, CIRI

Steve Foerster, Professor of Finance, Ivey Business School,  
University of Western Ontario

Andrea Gilpin, Senior Manager, Corporate Communications,  
Pfizer Canada Inc.

Yvette Lokker, Director, Communications &  
Professional Development, CIRI

Rob McInnis, Manager, Investor Relations, Husky Oil

Susan Soprovich, Director, Investor Relations,  
Compton Petroleum Corporation

John Wheeler, Vice President, Investor Relations,  
TELUS Corporation

Andrew Wright, Director, Executive Development  
Programs, Ivey Business School

## Certification Governance Committee

Michelle Dodokin, Vice President, Finance, Ontario and Atlantic,  
Intact Insurance

Tom Enright, President & CEO, CIRI

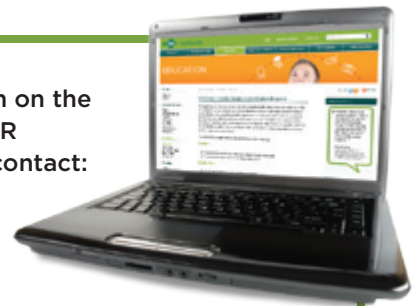
Yvette Lokker, Director, Communications & Professional  
Development, CIRI

Colleen Vancha, Senior Vice President, Investor Relations  
& Corporate Affairs, Vitera

Greg Waller, Vice President, Investor Relations &  
Strategic Analysis, Teck Resources Limited

➤ **For more information on the program and the CPIR designation, please contact:**

Yvette Lokker at  
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or (416) 364-8200  
www.ciri.org



Be Informed.  
Be Connected.  
Be Current.  
**Be a CPIR.**

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