



Date completed _____

EVALUATION FORM *for* MONTHLY E-CAST

Name _____ Designations (JD, CPA, CFP, CLU, CIMA, etc.) _____

Profession _____

Company Name _____

Title _____

Address _____

Telephone _____ Fax _____

E-mail address _____

How did you hear about this E-Cast? _____

OVERALL E-CAST EVALUATION

Were the stated learning objectives met? If not, please explain. _____

Were the E-Cast materials presented accurate? _____

Were the E-Cast materials relevant and did they contribute to the achievement of the learning objectives?



Was the time allotted to each learning activity appropriate? _____

Were the individual instructors effective? _____

Were the facilities and audio visual presentations appropriate? If not, how could we improve them?

Were the handout materials satisfactory? _____

Were the audio and video materials effective? _____

Continuing Education Credits for this course are as follows:

- **CFPs:** This E-Cast has been approved for 1.0 hour of CE credits. CFP Board Provider No. 2920.
- **CPAs:** This program has been approved for 1.0 hour of CPE credit. CPE Sponsor No. 108731.
- **CPA Program Specifics:** Program level is intermediate. Although no formal prerequisites are required, attendees should have a minimum of ten years experience in their respective fields, and sufficient knowledge and expertise working in the affluent market for Estate and Income Tax purposes. Instructional method is Group Live. The E-Cast will be approved for one CPE credit hour. In accordance with the standards of the National Registry of CPE Sponsors, CPE credits have been granted based on a 50 minute hour.
- **CPA Program Refund and Complaint Resolution Policy:** If a participant has a schedule conflict, every attempt will be made to enroll the person in an alternative program. Every effort will be made to resolve any complaints to the customer's complete satisfaction. For more information regarding administrative policies such as complaint and refund, please contact our offices at 888-807-5958 Kimberly Hamilton - Ext. 83. InKnowVision, LLC is registered with the National Association of State Boards of Accountancy(NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN 37219-2417. Web site: www.nasba.org.

Any questions regarding CE credit, please contact Sue Hillstrom at sue@inknowvision.com or 1-888-807-5958 ext. 85.

Please return to: email info@inknowvision.com or FAX 801-697-2371.

