

ETHICS EVENT LOGISTICS DETAILS

This course was developed and will be delivered **as an interactive class, not a webinar.**

Here are some tips and information to help you have the best possible experience:

Have your “Yellow Book” (the New Code and Standards) AND the Roadmap handy.

- You can find a link for the Code of Ethics and Practice Standards “Yellow Book” and the Roadmap at: www.cfp.net/ethics/compliance-resources
- Yellow Book only:
www.cfp.net/-/media/files/cfp-board/standards-and-ethics/cfp-code-and-standards.pdf
- Roadmap only:
www.cfp.net/-/media/files/cfp-board/standards-and-ethics/roadmap-to-code-and-standards.pdf

To have the best experience AND ensure you are eligible for CE Credits:

1. Sign in to the course in a timely manner – we suggest 10 to 15 min ahead of the class start to check that your technology functions as intended so you are ready to go when the course starts.
 - a. Have your video and audio on – so you can be seen and heard
 - b. Have your name accurately showing on your Zoom thumbnail image
2. Participate in the interactive discussion via any/all of the following ways:
 - a. Self-management of mute/unmute to participate in discussion
 - b. Visual cues via your video link (nodding head, thumbs up/down, etc.)
 - c. Zoom emoticons
 - d. Zoom Chat Box
3. Participate in the course exercises via the Mentimeter response system, ideally also using your real name in the Menti as your onscreen identity.
4. Be present until the course concludes.
5. Supply accurate name, CFP ID number, and contact information in your chapters’ registration module and sign in/sign out process
6. For the best speed and reliability, we recommend a hard-wired connection to the Internet versus relying on a Wi-Fi signal.

Mentimeter provides immediate and continual commentary and interaction. There’s no app to download, simply go to www.menti.com and enter the code for the class at the beginning of the session. >Using dual monitors or accessing Mentimeter with your phone while attending the event on your computer makes the interactive component most enjoyable.

Melissa will announce the Menti code in the opening remarks, the code will show on the screen on every slide and it will be in the online Chat box.