



IBBA Headquarters
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IBBA University Field Course Rules and Regulations

Through IBBA University, business brokerage professionals are able to advance their understanding of the industry and sharpen their skills, enabling them to become more successful in business. By taking the appropriate courses, members can earn the prestigious Certified Business Intermediary (CBI®) and Master Merger and Acquisitions Intermediary® designations. These credentials tell the world of your personal level of commitment to the brokerage business.

IBBA's courses are available for instruction to Local and Regional Affiliates who are actively a part of IBBA. It is preferred that courses be given through local, state or regional affiliates. However, consideration shall be given to non-affiliated entities as well. **IBBA Headquarters must approve all field courses. Courses may not be offered by any affiliate group either 45 days prior to or following an IBBA Conference for Professional Development or within 1,000 miles of the conference location.** Please read all of the enclosed materials prior to requesting a course.

To Schedule a Field Course:

1. The affiliate will designate one contact person who will communicate with IBBA Headquarters to facilitate the scheduling and implementation of the course.
2. At least 45 days prior to the date of the event, the Affiliate contact must notify IBBA Headquarters of the date and location of the course by completing the Field Course Request form.
3. IBBA Headquarters Staff will assist in finding an IBBA University approved instructor for the requested course. The affiliate may not schedule local instructors who are not certified by the IBBA Education Committee to teach the course. Use of a non-approved instructor will prohibit the students from receiving IBBA educational credit, even though the use fee has been paid. The IBBA Education Committee will provide a list of certified instructors to IBBA Headquarters. Once an instructor is selected, the Affiliate will need to work with the instructor in regards to fees (in accordance with the IBBA reimbursement program) and other course details. The affiliate will be totally responsible for all expenses involved in producing the event, which normally will include the instructor expenses, facility charges, any meal costs, and all promotional costs incurred. IBBA will not be responsible for any payment related to the affiliate event.
4. For a majority of courses, there is a mandatory usage fee of \$200 per course as well as a per student fee of \$50 for 4hr courses, \$85 for 8hr courses and \$150 for 16hr courses for use of the IBBA University materials to be paid directly to IBBA, regardless of the student's IBBA membership status. There is a mandatory fee of \$105 per student for Courses #340, #350, #360, #370, #423 and #425. Each individual student will make his/her payment to the designated affiliate representative who will in turn provide one (1) check to IBBA Headquarters. All non-IBBA members attending the course will be levied the use fee as well. (ex: 10 students for an 8 hr course = one check for \$1,050) The use fee covers the cost of the course verification forms, course materials, instructor text, final exam and retention of course credits at IBBA Headquarters.
5. IBBA Headquarters Staff will post the course information on the Affiliates page of the IBBA Website.
6. IBBA Headquarters Staff will work with the Affiliate Contact to determine the date that final attendee numbers will need to be established for printed materials.

In order to provide sufficient time to present the course, the following schedule is recommended for 8hr and 16hr courses:

8:30 a.m. - 10:00 a.m. Course
10:00 a.m. - 10:30 a.m. Break
10:30 a.m. - 12:00 p.m. Course
12:00 p.m. - 1:00 p.m. Lunch
1:00 p.m. - 3:00 p.m. Course
3:00 p.m. - 3:30 p.m. Break
3:30 p.m. - 4:00 p.m. Review
4:00 p.m. - 5:00 p.m. Exam

*4hr courses should use the schedule from 8:30 a.m. - 12:00 p.m. or 1:00 p.m. - 5:00 p.m. above.

Within **seven (7)** days after the completion of the Field Course:

1. The Affiliate Contact should mail the final roster of attendees to IBBA Headquarters. This will be used to distribute Course Verification Forms to attendees.
2. The Affiliate Contact will mail **one** check for **Total Course Fees**.

Instructor Fees for offering an IBBA Field Course

1. Standard Instructor Fees: Instructor(s) fees payable directly to instructor at time of course presentation:
One-half day course: \$500
One day course: \$700
Two day course: \$1,400
2. Transportation: The travel allowance for instructor includes local transfers, round-trip coach airfare or best-cost airfare. This amount should be agreed upon between the instructor and the sponsoring organization before travel commences.
3. Lodging: Allowable room rates are those being charged for the site hotel or other hotel approved by the sponsoring organization. The allowance includes room costs for two nights for one-day and half-day courses and three nights for two-day courses.
4. Meals: The recommended per diem for meal and personal expense is up to \$50 per day of instruction (\$30 per half-day courses).
5. Miscellaneous: Out of pocket expense as required by the course instructor. These expenses may include audio/visual equipment and reproducing of course materials/handouts.

Request Form for IBBA University Field Course

(Please photocopy and when applying for multiple courses)

Applicant:

Affiliate/Group: _____

Contact: _____

Address: _____

City: _____ State/Province _____ Zip/Postal Code _____

Country: _____

Phone: _____ Fax: _____

Email: _____

Course:

Course # _____ Name of Course _____

Date Course is being offered: _____

Location for course: City: _____ State: _____

Number of students expected: _____

Instructor 1 _____

Instructor 2 _____

I have read the IBBA University Field Course Rules and Regulations and agree to the terms.

Signature

Date

For Headquarters use only:

Instructor available: _____

White and Yellow copies of CVFs received: Qty: _____ Date: _____

Fee Received: Date: _____ \$ _____ Batch: _____

Yellow CVFs mailed: _____ Date: _____