



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.

All of 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 within 1000 miles of an IBBA Conference for Professional Development for the 45 days prior to and following the conference.** Please read all of the enclosed materials prior to requesting a course.

Prior to 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, IBBA Headquarters should be notified of the date and location of the course by completing and returning the enclosed **Field Course Request** form.
3. IBBA Headquarters Staff will notify the IBBA University approved instructor of your request. (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 Education Committee will provide a list of certified instructors to IBBA Headquarters.)
4. The instructor will contact you to discuss fees (in accordance with the IBBA reimbursement program), course details and to accept or decline the offer. (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.)
5. There is a mandatory use fee of \$95.00 per student per course (4hr, 8hr or 16 hr) for use of the IBBA University materials to be paid directly to IBBA, regardless of the student's IBBA membership status. 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 = one check for \$950) 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.

Course credits are eight hours per day (or as otherwise indicated). In order to include sufficient hours the following schedule is recommended:

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

6. Once the course instructor and dates have been confirmed you must immediately notify IBBA Headquarters.
7. Staff will post the course/conference information on the Affiliates page of the IBBA Website.
8. Staff at IBBA Headquarters will determine on a case by case basis the date that final attendee numbers will need to be established for printed materials.

Within **seven** days after the completion of the Field Course:

1. Affiliate group should mail the white and yellow copies of the Course Verification Form to IBBA Headquarters.
2. Affiliate group 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: _____

