



8885 Rio San Diego Drive Suite 237  
San Diego, CA 92108  
(888) 582-9752

### **Administrative Policies**

All Policies below live here: <https://certifiedtaxcoach.org/resources-you-need/cpe-details/>

### **Record Retention Policy**

The American Institute of Certified Tax Planners (AICTP) will retain the following documentation for a minimum of 5 years:

- Records of participation
- Dates and locations of program offerings
- Author/instructor, author/developer and reviewer names and credentials. This will include the state of licensure, license number and status of license for the CPA and tax attorney acting as an author/instructor, author/developer and reviewer for accounting, auditing or tax program(s). This will also include the enrolled agent number for the enrolled agent acting in such capacity for tax program(s).
- Number of CPE credits earned by participants
- Results of program evaluations
- Program descriptive materials (course announcement information)

AICTP intends to use the word count methodology, and the most common modality will be video, for determination of CPE credits per program. In the future, if AICPT develops courses requiring pilot testing, including adaptive learning self study programs, records will be retained including the following:

- When the pilot test was conducted
- The intended participant population
- How the sample of pilot testers was selected
- Names and credentials and relevant experience of sample pilot test participants
- For CPA pilot testers, the state of licensure, license number, and status of license should be maintained
- A summary of pilot test participants' actual completion time
- Statement from each pilot tester to confirm that the pilot tester is independent from the course development group and that the pilot tester was not informed in advance of the expected completion time
- For adaptive learning self study programs, all potential paths that a learner could take to complete the program will be documented and retained.

### **Refund Policy**

Requests for refunds must be received in writing at least one month prior to program date. Requests received later than one month prior to the program date will not be honored.



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**Program Cancellation Policy**

If the American Institute of Certified Tax Planners needs to cancel a program, we will contact affected parties by email as soon as is reasonably possible, and discuss alternative arrangements when possible.

**Complaint Resolution Policy**

To file a complaint, please contact within 30 days of relevant incident:

Josh Preece

Chief of Staff/ Director of Business Development

619-677-1330

[josh@certifiedtaxplanners.com](mailto:josh@certifiedtaxplanners.com)

**Course Update Policy**

Our course documentation will contain the most recent publication, revision or review date. Courses will be revised as soon as feasible following changes to relative codes, laws, rulings, decisions, interpretations, etc. Courses in subjects that undergo frequent changes will be reviewed by a subject matter expert at least once a year. Other courses will be reviewed every 2 years. AICTP is using a table of programs developed to appropriately track updates.