

ICPA Survival Guide

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What Have I Gotten Myself Into?

Welcome to the ICPA member survival guide. It's not like you need a "survival" guide because it's pretty easy to survive in this group. First, we are very nice people (just ask our moms!). Second, we have a great time. Third, we are going to rock your compliance world and life will never be the same. We could tell you how this guide is your resource to understand the mission of the organization and inform you of membership benefits....blah....blah...blah. Let's just say, this will tell you all things ICPA!

Most of the things that you see and everything you appreciate about ICPA is done by volunteers. That's a lot of work! The reason this works for us is that everyone cares about the organization and, even more important, people care about each other. We go out of our way to make people feel special and a part of the group. We celebrate birthdays, share photos on our Facebook page, and help each other during difficult times. Some might think that goes way beyond the goal of a trade organization, but that is why we are different. Here's the link to our FB page:

<https://www.facebook.com/groups/54643228810>

Compliance professionals have complex, stressful and, many times, thankless jobs. There is no reason why a trade organization can't serve the 9 to 5 (uh yeah....who has those hours!?) needs of a compliance professional **and** be fun and personal at the same time.

Who's Who at the Zoo

We have a Board of Directors who set policy, and Officers who manage and oversee the daily activities. Both board members and officers get to work on cool projects like the annual conference, seminars, and other membership activities. Running for a board or officer position is a great way to get involved and make lots of friends. Check out the website to see the current list of ~~victims~~.....uh make that hard- working dedicated professionals.

The board and officers may appear to be important people, but the real heart of the organization are the members. People like you! That's one difference you'll notice about ICPA; we are member focused and member oriented. We say we are a network of people and a world of knowledge and that motto is behind everything we do.

Welcome New Member

Accessing Our Website

The ICPA Web site can be accessed at: <http://www.icpainc.org>

The real fun begins when you log in and access the member only pages using your email address and password. In case you forgot your password, too bad. No wait actually there is a link below the password field to retrieve it.

Welcome Letter and ICPA Member Pin

Now that you have joined we'll really stick it to you! Not only do you receive a "Welcome Letter" from the ICPA officers, you get an official ICPA pin, too. Wear the pin proudly to industry events so other ICPA member can recognize you and non-members can avoid you.

Who Do You Call (or E-Mail) for Help

General ICPA questions send to wizard@icpainc.org

Website questions or issues send to webmaster@icpainc.org

Volunteers

Yes, that means no pay.....at least no monetary reward. ICPA is a volunteer organization and encourages its members to actively participate in its events. Working on the Annual Conference, One Day Conferences and committee projects are some of the ways you can contribute to the success of ICPA. You'll see emails throughout the year asking for volunteers or just tell an officer or board member if you want to help.

Membership

How to renew your membership

You should receive an automatic renewal email about 30 days and then another a week before your membership expires. Sometimes, spam blockers or Firewalls prevent these emails from being delivered. If your membership expires before you renew, you won't be able to access the members only section of the website and the daily Q & A emails will stop. You can see your membership expiration date at very top right after you sign in.

For All Membership Types Except Associate Business/Service Providers

To renew, go to the website and click on "JOIN/RENEW" button bar" and then the renew link and show us the money! Or you can also use the link below: <http://joinicpa.conferencetime.com/>

Note: NEW members ONLY start here:

<http://www.icpainc.org/register/>

For Associate Business/Service Providers Memberships ONLY:

If you are a Service Provider with an Associate Business Membership, only your company's "Primary" member can renew/add/delete membership so please contact them about renewing. The Primary Account Manager is the only member of the company authorized to renew/add or delete any of the 5 members allowed. When the Primary renews, all other members associated with the company also auto-renew. Here are the links for the Primary:

To renew your corporate membership:

<http://www.icpainc.org/renew-membership/>

To view/delete users in your group:

<http://www.icpainc.org/manage-comp-users/>

To register new users or make an Inactive user an active one:

<http://www.icpainc.org/register-a-comp-user/>

Terms of Use

Use of the ICPA membership list for advertising or solicitation of any kind without written permission from the ICPA Board of Directors is strictly forbidden. Any person or company violating this policy immediately forfeits their ICPA membership

ICPA Disclaimer

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Membership Responsibilities and Legal Conditions

ICPA protects our membership. We do not disclose your personal information or sell our membership list...ever! We do ask members to agree to some specific responsibilities and a set of legal conditions. Those are explained in the paragraphs that follow.

Questions to the Members (Daily Q&A)

One of the great benefits of ICPA membership is the question and answer feature. Members can ask and answer questions anonymously. You

won't even see your picture on a wanted poster! We'll send out questions and give the membership an opportunity to respond and then we'll send out the original question and all the answers. That's a whole heap of brain cells in one place!

How Do I Pose a Question To The Membership?

Simple: Send your question to:

askthemembership@icpainc.org.

NOTE: Your question will remain anonymous unless you specifically request to be identified or contacted directly.

How Do I Answer a Question?

Easy, just hit "REPLY" to a Question (Never "REPLY TO ALL")

NOTE: Your question will remain anonymous unless you specifically request to be identified or contacted directly.

Where Do I Find Previous Q & A?

All of the past questions and answers are kept in a comprehensive database on the website that you can search by topic. But you have to be a member and need to sign in. Whoops! We started talking in "compliance speak." Yeah.....that's the ticket! Just go to the "LIBRARY" button bar and then the "ANSWER DATABASE" in the pull down menu.

Careers - Job Postings and Resumes

How to Post a Job Vacancy or Resume

ICPA has a job vacancy board which is available to members and non-members for FREE! Anyone can post a job or resume, but only members can view them. See the "JOBS" button bar near the top of the website. For jobs, you can download the JOBS form found within the Blue Bar. Once you fill it out and upload it and submit it with a title, we will review, approval and post. For resumes, the process is similar. We usually send an email Tuesday evenings announcing the new jobs and resumes for the week.

The Gathering of the Clan

Our Annual Conference

The ICPA annual conference (March) was created as the perfect forum for members of the international trade community to come together and learn from industry experts and network with other compliance professionals. Each conference is specifically designed with the needs of the membership in mind. Sessions are relevant to current issues, compliance requirements, and offer something for both the novice and experienced professional.

Other ICPA Sponsored Conferences

Each year, ICPA schedules 5 other conferences in addition to the Annual Conference. The conferences are at a rotating geographic location (this can cause some dizziness but it's worth it) and address a current topics of interest. Basic schedules are:

Canada – May

Europe – June

Fall US Conference – October

Singapore – November

Shanghai - November

And All that Jazz

Scholarship Program

ICPA takes special interest in supporting learning opportunities through its scholarship program and the ICPA Board approves scholarships for regular members and their families when possible. Please watch the messages posted on the ICPA website for details including application forms, requirements, and other important information.

Navigating the Website

www.icpainc.org

Navigating the ICPA Website

www.icpainc.org Here's where you unlock the secrets of the website. It's a pretty cool website and it's designed to give members tons of resources at their fingertips. Here are some of them...

Changing My Personal Settings

When you first joined ICPA you completed a profile with your name, favorite color, address, email, password, employer data etc. If any of these elements have changed (and if you're in this industry these change all the time!), you should update your profile to ensure information from ICPA reaches you. To make changes to your personal settings, log in and go to the USER MENU button bar at top right of the website home page, then to MY PROFILE on the list of options. Make your changes and you're done! Here you can also change your preference for whether or not you want your name or email address listed in the Membership Directory.

NOTE: Directory information is only available to other members.

Lost Password Help

If you forget your password (and who doesn't forget stuff?!) you can get a new one. Log into the Members Only section and click on "FORGET YOUR PASSWORD?" Your new password will be emailed to you. If you need help, please don't hesitate to contact the webmaster at webmaster@icpainc.org. He's not busy and we are the only friends he has!

Conference Information

Information on our conferences is everywhere on the website, on the Ticker Tape, and even under CONFERENCES Button Bar! To name a couple.

The Member Directory

A Member Directory (not including people in the witness protection program) is available only to members. Access the members only section, click on the USER MENU, then MEMBER DIRECTORY where you can search by member name, company, city or state or country. Members have the option to opt in or out of having their email address displayed or from being listed at all.

Conference Materials and Compliance Library

The Compliance Library contains many templates and reference materials as well as presentation materials from various ICPA sponsored seminars and conferences. Click on the LIBRARY button bar to access the drop down menu for access.

If you wish to add a document to the Compliance Library, email the document to webmaster@icpainc.org and we will load the document on the site.

Past ICPA Surveys

This page allows you to see the results of previous ICPA surveys. Of course, as a member you can ask ICPA to poll the membership with your survey questions by contacting wizard@icpainc.org. Answers are anonymous to protect the innocent!

Service Providers Link Web Page

ICPA members can be a little different. Different membership types that is- What did you think we meant? Not everyone is a "Regular Individual Member" -an importer or an exporter. Many are service providers- brokers, consultants, attorneys, etc. We developed this web to provide service provider contact information to our Regular Individual Members. See under USER MENU.

Bylaws

Here you can see the ICPA bylaws. They make great reading material! This is under the ICPA INFO Button Bar under LEGAL.

Calendar

Our calendar feature lists upcoming ICPA and other events. Let us know if you want something posted. This is under the ICPA INFO Button Bar and also on the HOME PAGE in the right hand column.

Ticker Tape

We scroll important updates and information on the ticker tape on the Home Page...check it out for important info.