

## Campus Rep Presentation Script

### Slide 1:

Hi, my name is \_\_\_\_\_, and I'm a Campus Rep for Gleim. I'd like to speak to you today about accounting certifications and designations.

### Slide 2:

Earning one or more of these certifications demonstrates your knowledge and competency in the field, increases your earning potential, and sets you apart from your peers.

### Slide 3:

Most of these certifications require a bachelor's degree or higher. Listed are the general requirements for each certification, when you should plan to sit for the certification, and if you can become certified during college.

### Slide 4:

Why Accounting Certifications?

**Career Advancement** "Certified professionals often find more opportunities for career advancement. With a certification, you could qualify for higher positions and responsibilities. Employers are likely to prefer candidates with verified skills and knowledge, paving the way for promotions and leadership roles."

**Increased Earning Potential** "One of the most tangible benefits of accounting certifications is the potential for increased earnings. Studies consistently show that certified accountants earn more on average than their non-certified counterparts. This financial reward is a direct reflection of the additional value certified professionals bring to their organizations."

**Enhance Your Credibility** "Accounting certifications significantly enhance your credibility. They serve as a formal recognition of your expertise and commitment to the field, reassuring employers and clients of your skills and dedication."

**Staying Current with Industry Trends** "Accounting certifications require continuous education and re-certification, ensuring that you stay up-to-date with the latest industry trends, regulations, and technologies. This commitment to lifelong learning not only enhances your knowledge but also keeps you competitive in a rapidly evolving field."

**Networking Opportunities** "Joining the community of certified professionals opens up extensive networking opportunities. Professional organizations and certification bodies often host events, forums, and workshops, where you can connect with peers, mentors, and industry leaders. These connections can be invaluable for career growth and professional development."

#### **Slide 5:**

The certification you've probably heard about the most is the CPA. The CPA enables accountants to serve as trusted financial advisors who help individuals, businesses, and other organizations plan and reach their financial goals.

Once you earn the CPA, you're on the path to becoming an accounting manager, chief financial officer, or corporate controller, among other things. The top 5 reasons most individuals choose to earn their CPA are 1) Earning potential; 2) Career opportunities; 3) Stability; 4) Flexibility; and 5) Prestige and respect. While some CPA requirements may vary slightly by state, passing the CPA Exam is something every CPA candidate must do, and it's something many students have been able to do while taking classes.

#### **Slide 6:**

As of January 2024, the CPA Exam changed significantly. The exam is still a 4-part exam; however, the 4th part is up to the candidate. Under what's called CPA Evolution, all candidates will take 3 CORE Exams plus 1 Discipline Exam. While the discipline exam may vary among candidates, it will still result in a single CPA license. CPA licenses will not distinguish between what discipline a candidate may take.

The **CPA** Core Exams are:

- Auditing and Attestation (or AUD),
- Financial Accounting and Reporting (or FAR), and
- Tax and Regulation (or REG)

Core exams are made up of introductory or intermediate content.

A candidate will choose one of 3 Discipline exams:

- Business Analysis and Reporting (or BAR),
  - Information System and Controls (or ISC), and
  - Tax Compliance and Planning (or TCP)
- Discipline exams are made up of more advanced content in each area. Candidates can only take 1 discipline exam.

Most content on the CPA exam includes topics you are already studying, depending on the classes you're taking. Taking the exam now while some of this information is still fresh can save you a lot of time studying.

You can learn more about the CPA Exam content in the CPA Exam blueprints provided by the AICPA and in the free CPA Exam Guide provided by Gleim! Let me know if you'd like to get details on how to access the free CPA Exam Guide.

#### **Slide 7:**

As I mentioned, the CORE exams are Auditing & Attestation (AUD), Taxation and Regulation (REG) and Financial Accounting & Reporting (FAR). This slide shows the specific topics tested on each of the 3 CORE exams. The percentages that you see next to the topics are the percentage that the topic is tested on the exam.

#### **Slide 8:**

**The Discipline exams also have varying topics and testing weight. This slide shows the various topics tested on each exam and the percentage they are tested on the exam.**

#### **Slide 9:**

Each exam is a 4-hour exam. Also, each exam is made up of two main question types: Multiple-Choice Questions and Task-Based Simulations. The # of MCQ's or TBS's does vary by exam section.

Multiple-Choice Questions are just what you'd expect: a question with multiple answer options. Task Based Simulations are case studies that require you to complete tasks using the information provided. Completing a task may involve choosing the correct answer from a pop-up list, filling out tax forms, entering formulas or amounts into a spreadsheet, or selecting text that accurately completes a document in a Document Review Simulation.

It's also important to notice the score weighing each question type has for each exam. Most exam scores will be based on 50% from your MCQ performance and 50% from your TBS performance. For the ISC section, 60% of your score comes from your Multiple-choice question performance and 40% from your Task-based simulation performance.

#### **Slide 10:**

Here are some important dates to keep in mind as we move through 2025. There are specific dates that you can test for your discipline exams. The core test dates are on continuous testing. It's important to notice on this slide the delay in getting your scores after you test especially for the discipline exams. Candidates will have to wait a significant amount of time to see whether they passed their exams or not. Given these delays, it's important that you have an exam testing strategy as you will want to move on to your next planned section while you wait for your scores in order to get through the exam in a timely manner.

**Slide 11:**

This slide provides a detailed breakdown of the 2025 quarters and outlines the expected score release dates corresponding to the exam dates specified on the slide.

**Slide 12:**

Now here is some good news! In 2023, the model rules were changed to allow candidates to have 30 months to complete their 4 part exam. However, each State Board had to vote to adopt that change. As of January 2024, the states in Green have voted to move to 30 months and have already implemented that change. The states in yellow have voted to move to 30 months but they are still in the process of getting it into their rules. 3 states have actually voted to go to 36 months; Washington has voted & implemented the rule to move to 36 months; while South Carolina & Indiana have voted to move to 36 months but are still in the process of implementing the rule change. Stay connected to Gleim to get the latest information on the status of the State Board rule changes.

**Slide 13:**

CMA is a professional certification specifically designed for accounting professionals to demonstrate their knowledge and skills in the areas of management accounting and financial management. A CMA blends accounting practices with business acumen. Typically, CMAs specialize in managerial accounting and financial management. You'll find that CMAs explain the "why" behind the numbers and are able to turn data into talking points or dialogue.

So, why should you pursue the CMA certification? Just like the CPA, obtaining your CMA will definitely increase your earning potential.

While the CPA is considered the gold standard in accounting; the CMA is considered the gold standard in management accounting. CMAs working in the Big 4 are able to provide insight and better ability to connect with clients, probably because they understand what is going on behind the "books".

**Slide 14:**

So, why should you pursue the CMA certification? When polled, 82% of CMAs in the Americas agreed that the CMA increased their career choices and allowed them to move across all areas of the business more readily. As with the CPA, the career opportunities for CMAs are significantly increased. Just like the CPA, obtaining your CMA will definitely increase your earning potential. The IMA's Global Salary Survey shows that CMAs earn about 21% more in total compensation than non-CMAs globally.

### **Slide 15:**

The requirements to become CMA certified include Education, Examination, Experience & Ethics (very similar to the CPA). As a CMA candidate, you have up to 7 years to submit your education hours; this means that you can begin as a student. You must pass both parts of the CMA exam within 3 years so again, you can easily get started in your Junior or Senior year. While you must have 2 continuous years of professional experience to obtain your CMA, you do have up to 7 years of passing your exam to do so. So, why should you consider getting started on this certification now? There is a lot of crossover between the coursework you may be enrolled in and the CMA exam content. You're already in study mode and the content will be fresh in your mind. You will be on your way to earning more as well as setting yourself apart from your peers but getting a jump on your professional certifications.

### **Slide 16:**

Here is a content breakdown between the 2 parts of the CMA Exam. Similar to the CPA, each topic has a percentage next to it that shows at what percentage that topic is tested on the specific CMA part. You can learn more about the CMA exam content in the Gleim CMA Exam Guide, which is free! Again, please let me know if you'd like me to send you information to access these free exam guides.

### **Slide 17:**

There are just 2 types of questions on the CMA Exam: multiple-choice and essays. The essays require you to provide written responses to prompts and perform calculations. You will want to show your work on calculations. You can get partial credit for your essay responses. Each exam part features 100 multiple-choice questions and 2 essay questions. Each essay has multiple questions or prompts. You must answer at least 50% of the multiple-choice questions correctly in order to move on to the essays. You will have 3 hours to complete the multiple-choice questions and 1 hour to finish the essays, so total testing time is 4 hours for each CMA exam part. There are 3 annual testing windows: January to February, May to June, and September to October. The passing score is 360 on a scale from 0-500. You have 3 years to pass both parts of the exam.

### **Slide 18:**

If you're interested in internal audit, you'll want to earn the CIA as well. The CIA is a globally accepted certification through which individuals demonstrate their professionalism in the internal audit field. It ensures accounting accuracy by minimizing fraud, risk, and waste.

When you're a CIA, your title can be internal audit manager, quality assurance manager, or chief audit executive, among other things. You also can earn an additional \$32,000 per year

by adding this certificate. Additionally, CIA's are in constant demand and provide advancement and growth opportunities.

### **Slide 19:**

**Education:** To start, let's talk about the educational requirements. The IIA offers a pathway through various educational backgrounds:

- A Master's Degree can significantly shorten your path.
- A Bachelor's Degree is another recognized entry point.
- Holding an active Internal Audit Practitioner designation is also beneficial.

**Exams:** Finally, candidates must successfully pass all three parts of the exam. It's important to note:

- You must complete and pass these exams within a 3-year timeframe.

**Experience:** Next, we focus on professional experience, which is a crucial aspect of certification:

- The IIA requires candidates with a Master's Degree to have 1 year of internal audit experience.
- Those with a Bachelor's Degree need 2 years of experience.
- If you hold an active Internal Audit Practitioner designation, 5 years of experience is necessary.

**Ethics:** Ethical practice is fundamental in any profession. As such, the IIA mandates adherence to its established Code of Ethics, underscoring the importance of integrity and professionalism in the field.

These requirements ensure that certified internal auditors possess both the academic background and professional experience needed to uphold the standards of the profession. Remember, certification is not just a commitment to excellence but also a pledge to maintain ethical standards in all audits.

### **Slide 20:**

The CIA Exam has 3 parts:

- Part 1: Internal Audit Fundamentals
- Part 2: Internal Audit Engagement
- Part 3: Internal Audit Function

These charts show the topics tested and how they are weighted on the exam. You can find a more detailed breakdown in the free CIA Exam Guide from Gleim. You can download this exam guide on the Gleim website as well. Ask me about it if you're interested.

**Slide 21:**

There are no testing windows or blackout dates for the CIA exam, so you can sit for one part at a time whenever you want. However, once you register for an exam part, you have to schedule and sit for that part within 180 days. You have three years to complete all requirements for the CIA certification.

The CIA exam keeps its question types simple: every question on the exam is a multiple-choice question.

Part 1 has 125 questions, while Part 2 and 3 have just 100 questions each.

The total testing time for each part varies depending on the number of questions. You have 2½ hours to pass Part 1 and 2 hours to pass Parts 2 and 3.

**Slide 22:**

If you want to focus your accounting career on tax, you should earn the EA. The EA designation is the only federal credential for tax practitioners who specialize in taxation. An EA designation grants enrolled agents unlimited rights to represent taxpayers before the IRS.

The only thing you have to do to become an EA is pass the EA exam, also known as the IRS Special Enrollment Examination, or SEE. There are no boundaries to sit for the exam; it's a national license. There are no education or experience requirements either. The job titles you could hold as an EA include tax accountant, tax manager, staff accountant, and senior tax accountant. You could also work for yourself and have your own tax practice.

**Slide 23:**

The EA exam is composed of 3 parts:

- Part 1: Individuals
- Part 2: Businesses
- Part 3: Representation, Practices, and Procedures

The topics tested and their weights are shown here, but you can get more info in the free EA Exam Guide from Gleim.

**Slide 24:**

The EA exam only contains multiple-choice questions and there are 100 questions per part. It is split into two sections of 50 questions each, with an optional 15-minute break in-between.

Because each part has the same number and type of questions, testing time for each part is also the same: 3½ hours per part.

You can sit for the EA exam any time from May 1 to February 28—any month except March or April. You have 2 years to pass the entire exam, but you should try to pass all 3 parts of the exam within 1 year, as the exam is updated annually to reflect changes in tax law. Gleim courses are always up-to date.

**Slide 25:**

The newest certification, which just launched from the IMA is the FMAA – Financial & Managerial Accounting Associate.

This certification is ideal for students and instills fundamental knowledge & competencies in accounting & finance.

Why should you consider pursuing the FMAA? It will showcase your foundational knowledge in the language of business. While it is voluntary, it will stand out to potential employers. It will help build confidence necessary in general business topics. The FMAA is also a stepping stone to the CMA exam.

**Slide 26:**

Who should pursue the FMAA? 2-year or 4-year college students should absolutely consider this certification. It is also good for MBA students or professionals who want to strengthen their knowledge & skills.

**Slide 27:**

The FMAA is a 2-hour exam; all multiple-choice questions. There are a total of 80 MCQs and will take about 50 hours to prepare. The exam fee is paid to the IMA and is \$299. The breakdown of the topics tested on the FMAA are shown here along with the percentage each topic is tested.

Gleim is offering prep materials for this certification exam!

**Slide 28:**

Getting a head start on your exam prep is important, and Gleim can provide you with early practice while helping you with your current college classes.

EQE is an undergraduate series designed to supplement accounting courses and to help you gain higher comprehension and test scores on your college exams. It improves your studying and tests your knowledge by cross-referencing exam-quality practice questions to your accounting textbooks in an interactive environment.



Gleim also offers Exam Questions & Explanations (EQE) books and test prep covering Auditing, Cost and Managerial Accounting, Tax, Financial Accounting, and Business Law for \$35 per book for students.

As a thank you gift for attending or watching this presentation, Gleim wants to offer you one free EQE online test bank of your choice. Please remember to add your contact information to the sign-in sheet or send your name and email address to me so I can submit it to the Campus Rep Coordinator who will assist you with redeeming your free EQE online test bank.

### **Slide 29:**

Why Gleim?

With over 50 years of experience you can trust Gleim to prepare you to pass each of these exams on your first attempt.

Gleim is a family-owned company and is known for its customer service and support.

Students always get our best offer, and payment plans are also available. Using your dot EDU school email address will automatically allow you to receive our best discount when you purchase your Gleim materials. Remember to let Gleim know that you were referred by your school's Campus Rep.

### **Slide 30:**

**We celebrate the vision of Dr. Gleim, whose pioneering contributions have shaped the field of exam preparation.**

**1974** marked a revolutionary step as Dr. Gleim authored the very first CPA self-study book, setting the foundation for our innovative approach to learning.

Then, in **1980**, we achieved another milestone with the development of the world's first CIA review course, opening new doors for students aspiring to excel in internal auditing.

Continuing this tradition of innovation, **1981** saw the creation of the first-ever CMA prep course, reinforcing our commitment to providing comprehensive study solutions across disciplines.

Fast forward to **1999**, when we expanded our offerings with the launch of our EA Review program, further supporting professionals in achieving their certification goals.

Now, in **2024**, we introduced study materials for the new FMAA exam, underscoring our ongoing dedication to adapt and evolve with the changing educational needs.

From the past to the present, Dr. Gleim's vision propels us forward as we continue to support learners in their journey to success.

**Slide 31:**

Our SmartAdapt learning platform identifies where you need to focus (and where you don't) throughout your studies in order to be 100% prepared for the exam. SmartAdapt is like your personal exam tutor, telling you exactly what you should be studying, providing personalized feedback, adjusting as you go, and—most importantly—letting you know when you're ready to pass!

- An interactive Study Planner helps you set goals and track your progress
- Quizzes determine your weaknesses and adjust as your scores improve
- Based on your plan and performance, SmartAdapt delivers the content you need, when you need it
- Get on-demand, up-to-date performance metrics for each exam section and each study unit

**Slide 32:**

Gleim has fully adaptive review systems for all of the credentials we just covered. Included is the largest test bank of questions and our access until you pass guarantee meaning you'll have access to your materials & all updates until you pass your exam. All questions in all the review systems emulate the actual exam for the certification. You have the option to get both print and digital books, as well as audio lectures and Gleim instruct videos. Some review systems provide private study groups as well.

**Slide 33:**

Gleim also gives you the chance to earn a full review system of your choice by joining the Gleim Campus Rep program. As a campus rep, you'll not only receive free exam prep, but you'll also be able to learn about the exam process and content, build your resume, and network with professionals. If you'd like to learn more about what I do or join me in my role here on campus, please come speak with me.

**Slide 34:**

Try Gleim for free today by signing up for our free trial. You'll receive access to the entire first study unit of our Premium course at no cost. To get started, simply visit the URL shown on the screen and complete the registration form with your name and email address. Our free trial is available on any device—whether it's a phone, tablet, laptop, or desktop—as long as you have an internet connection.

**Slide 35:**

Questions?

**Slide 36:**

You can learn more about Gleim review systems by visiting their website, [gleim.com](http://gleim.com), by calling 800.874.5346, or by emailing [accountingteam@gleim.com](mailto:accountingteam@gleim.com).

Please reach out to me to learn more about becoming a Gleim Campus Rep.