President’s Message

Dear Philadelphia Chapter Member -

Thank you for being a loyal IIA Member and supporting the Philadelphia Chapter. This 2018-2019 Chapter year serves as our 75th year and it is an honor to be part of such a long-standing chapter. The commitment and dedication of the members, volunteers, officers and board members have made the Philadelphia Chapter successful.

I am excited to announce that the 2018 fall conference is almost sold out so hurry and register today!! The theme for this year’s fall conference, “Back to Basics in Times of Innovation”, holds so much importance in our jobs today as technology, regulation and business processes are constantly changing. How are we supposed to keep up? Knowledge of the key concepts and audit principles are the basis of everything that we do and will help guide us. One of the goals of the conference is to revisit and refine those core concepts and principles; and we have an exciting line up of speakers to address key topics in this area.

We are very honored to have Naohiro Mouri, IIA Global Chairman as our morning keynote. For his chairman’s theme, Mouri-san chose “Emphasize the Basics. Elevate the Standards”, which goes hand in hand with our overall conference theme. Mouri-san will
emphasize that as Internal Auditors we should all go back to the basics to remain relevant and use all the tools provided from the IIA standards to build the foundation on which we can elevate our professional claim.

I would like to thank our Chapter Officers and Board members, who are all volunteers, for their time, passion, vision and leadership for making sure that we serve our members in the best way possible. Our Chapter Officers are:

- Maeve Raak, VP of Programming
- Laurie Riggs, VP of Communications
- Michael Levy, VP of Membership
- Peter Parillo, Treasurer
- Marc Lyman, Secretary

The President and VP positions serve a one-year term and the Treasurer and Secretary serve a two-year term. The Board of Governors is made up of 17 members and two past presidents. The Board members serve a three-year term, in which they can be re-elected two times. Please visit the Chapter’s About Us page to view a list of the Board of Governors.

I initially became involved with the Chapter by volunteering to help with the 2012 Spring conference and have been involved with conferences and chapter initiatives ever since. Volunteering has connected me to other members and leaders in the IIA. Through volunteering, I have been able to advocate the internal audit profession, lead committees of volunteers and stay current with hot topics.

The Chapter is always looking for new volunteers to assist with planning seminars, conferences, networking events, Academic Relations Committee, NextGen Committee and other Chapter initiatives. Volunteers have the opportunity to work directly with the Officers and/or Board members, network and serve the Chapter Members and develop skills to become future Chapter leaders. If you are interested in volunteering, please send an email to membership@phillyiia.org.

The Chapter Leadership team has been working hard this year to bring outstanding learning and networking opportunities. Hopefully you have attended one of the events that we held these past few months. If not, do not miss out on any of our upcoming events! Registration is currently open for the following:

- Chapter’s 1st Annual Social being held on Tuesday, December 11th at the Continental Midtown
- Cyber at the Cira being held at the Cira Building on Monday, December 17th

Stay tuned for upcoming events in 2019 by checking out the Training & Events page and following us on social media.

Bernadette Robinson
President, Philadelphia IIA Chapter
75th Anniversary Celebration!

On September 27, 2018, our chapter celebrated its 75th Anniversary as an affiliate chapter of the Institute of Internal Auditors. We were so thrilled to have nearly 100 of our chapter members join us for a celebration at the dueling piano bar Howl at the Moon in Center City.

The event kicked off with opening remarks from Chapter President, Bernadette Robinson. Her introduction included heartfelt appreciation for our chapter’s past presidents, volunteers, and members who have supported the Chapter’s impressive growth over the last 75 years. Then, John McLaughlin and David Naser, who are both past presidents, volunteers, and members of our chapter, hosted a 2 CPE session. John covered *Third Party Risk Management: SOC Reporting* and provided an overview of the different types of reports, the sections within a report, and the challenges and pitfalls for reliance on SOC reporting. David followed up with a discussion on *Fraud is Everywhere* where he highlighted examples of Fraud in everyday life and what red flags to look for in assessing for fraud. We received positive feedback regarding their presentations and thank them for volunteering their time to share their expertise with our members. After the CPE session our members were treated to dinner and a 3-hour open bar where we all had the opportunity to network and admire a beautiful IIA ice sculpture gifted to us by Howl at the Moon. In attendance were various past presidents going back 35+ years, board members and members from 38 different organizations. We were entertained by dueling piano entertainment based on audience requests and many of our members were singing along enjoying themselves. It was overall a fun event that was successful in its goal of celebrating our chapter!

A special thank you to Simerjot Sidhu for the time he volunteered helping our Executive Team to put on this event. We wouldn’t be the Platinum-rated chapter we are today without our volunteers!
### Upcoming Chapter Events – Save the Date

<table>
<thead>
<tr>
<th>Date</th>
<th>Event Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 19, 2018</td>
<td>Fall Conference – “Back to the Basics in Times of Innovation”</td>
<td>Marriott Downtown Philadelphia, Philadelphia, PA</td>
</tr>
<tr>
<td>December 11, 2018</td>
<td>Holiday Social</td>
<td>Continental Midtown Philadelphia, PA</td>
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<tr>
<td>December 17, 2018</td>
<td>Cyber at the Cira</td>
<td>Cira Center Philadelphia, PA</td>
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<tr>
<td>January 2019</td>
<td>Governance/Risk/Compliance Event</td>
<td>TBD</td>
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<tr>
<td>February-March 2019</td>
<td>5 Levels of Leadership Workshop (Invitation Only)</td>
<td>TBD</td>
</tr>
<tr>
<td>March 21, 2019</td>
<td>NextGen Bowling Social</td>
<td>Lucky Strike Philadelphia, PA</td>
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<tr>
<td>March 22, 2019</td>
<td>Fraud Symposium</td>
<td>PECO Philadelphia, PA</td>
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<tr>
<td>May 3, 2019</td>
<td>Spring Summit</td>
<td>Loews Philadelphia Hotel Philadelphia, PA</td>
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<tr>
<td>April-May 2019</td>
<td>Philly IIA Golf Classic</td>
<td>TBD</td>
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<tr>
<td>May 2019</td>
<td>Internal Audit Awareness Month Departmental Contest (managed by NextGen) and Month-End Social</td>
<td>TBD</td>
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</tbody>
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Check out our Training and Events page for more information. [https://chapters.theiia.org/Philadelphia/Events/Pages/default.aspx](https://chapters.theiia.org/Philadelphia/Events/Pages/default.aspx)

Stay informed about upcoming programs by following the Philadelphia IIA Chapter on social media.

**Twitter:** @IIAPhiladelphia  
**Facebook:** [www.facebook.com/IIAPhiladelphia](www.facebook.com/IIAPhiladelphia)  
**LinkedIn:** [https://www.linkedin.com/groups/106938](https://www.linkedin.com/groups/106938)
Member Anniversaries & Certifications

The Philadelphia IIA Chapter would like to recognize and thank our long-standing members. Please join us in thanking the following members:

35 Years
Frank Hudson (November)
Rande Edward Whitham (December)

30 Years
Salim Alani (January)
Dan Thompson (August)
Michael Palish (September)
MaryLou Scalese (October)

25 Years
Sandra Mozee-Smith (July)
Joe Atkinson (September)
Nilu Shroff (September)
Dave Matthews (November)
Rich Wright (November)

20 Years
Alan Berkowitz (January)
Frank Tresnan (January)
Rob Kintzer (January)
Louis Iannarelli (February)
Denise DeMaio (March)
Wayne Tull (May)
Thu Nguyen (June)
Craig Snyder (July)
Michael Dixon (August)
Dan Kennedy (August)
Jeff Jobes (August)
Frank Pelone (September)
Eric Tomasic (September)
Sylvie Basinski (October)
Joe Kochub (October)

CONGRATULATIONS to the following Philadelphia IIA Chapter members who recently received IIA certifications!!

Certified Internal Auditor
Roy Baker
Casandra Best
Paige Clark
Glen Davis
Robert Farrow
Walter Jones
Sonia Lagares Viqueira
Kelly McGuire
Brittany Mula
Katelyn Ortepio
Melanie Wallace
Mary Wolfgang

Certified Professional Environmental Auditor – Responsible Care
Marianne Payne

Certification in Risk Management Assurance (CRMA)
Donovan Hawse
**SuccessPartners – New Chapter Program!**

IIA Philadelphia’s NextGen and Academic Relations Committees are proud to introduce our first mentorship program, *SuccessPartners*. The Chapter is looking for volunteers to participate in this program in two categories, young professionals currently working in internal audit with up to 10 years working experience and seasoned internal audit professionals with 10+ years working experience.

The program’s objective has a dual purpose: to provide local university students guidance and information on starting a career in internal audit, as well as offer young professionals career advice and guidance as they progress in their career.

Here’s how the program works: mentorship pods will be established, each with a seasoned professional, a young professional and a local university student who is interested in pursuing a career in internal audit. Mentors will work with mentees to establish specific goals and objectives. Objectives can be personalized to the needs of the individual, but could include various soft or technical skills such as: interviewing skills, resume building/presentation, networking and building professional relationships, certifications and specializations, overcoming challenges, dealing with stress, communicating difficult audit findings, audit report writing, using data analytics, and short / long term career goals.

Professionals will be asked to dedicate 10-20 hours over the course of the academic year (September – May). The pods should aim to meet either in person or via phone / video conference at least once a month. During the year, the group should try to meet in person at least once or twice.

Our goal for *SuccessPartners* is ultimately to further promote the profession, at the university level and beyond, as well as to help coach our young professionals as they develop in their careers. If would you like to participate in our pilot program, please reach out to Alicia Preddy, Academic Relations Chair (alicia.preddy@rsmus.com) or Laurie Riggs, VP of Communications (communications@phillyia.org) or either of our NextGen Co-Chairs, Danielle Ferrante (Danielle.ferrante@jefferson.edu) and Jillian Zerrillo (zerrilloj@email.chop.edu), by December 31st.
Changes Coming to the Certified Internal Auditor (CIA) Exam

To ensure the material within all three parts of the CIA exam stays current and valid, the CIA underwent a global job analysis study to determine the knowledge, skills, and abilities most applicable to today’s internal audit practitioners. The study results indicated the need to revise the exam syllabi to reflect the evolution of the internal audit profession worldwide. As a result, there are a number of changes coming to each part of the CIA examination, which will take effect in January 2019. Below is an overview of the changes that will be made to each part of the exam. For further details, please visit the IIA website.

Part I

<table>
<thead>
<tr>
<th>Current Version</th>
<th>Revised Version</th>
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<tbody>
<tr>
<td>• Mandatory Guidance</td>
<td>• Foundations of Internal Auditing</td>
</tr>
<tr>
<td>• Internal Control / Risk</td>
<td>• Independence and Objectivity</td>
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<tr>
<td>• Conducting Internal Audit Engagements – Audit Tools</td>
<td>• Proficiency and Due Professional Care</td>
</tr>
<tr>
<td>and Techniques</td>
<td>• Quality Assurance and Improvement Program</td>
</tr>
<tr>
<td></td>
<td>• Governance, Risk Management, and Control</td>
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<td>• Fraud Risks</td>
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Part II

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<th>Revised Version</th>
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<tbody>
<tr>
<td>• Managing the Internal Audit Function</td>
<td>• Managing the Internal Audit Activity</td>
</tr>
<tr>
<td>• Managing the Individual Engagements</td>
<td>• Planning the Engagement</td>
</tr>
<tr>
<td>• Fraud Risk and Controls</td>
<td>• Performing the Engagement</td>
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<td></td>
<td>• Communicating Engagement Results and Monitoring Progress</td>
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</table>

Part III

<table>
<thead>
<tr>
<th>Current Version</th>
<th>Revised Version</th>
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<tbody>
<tr>
<td>• Governance / Business Ethics</td>
<td>• Business Acumen</td>
</tr>
<tr>
<td>• Risk Management</td>
<td>• Information Security</td>
</tr>
<tr>
<td>• Organizational Structure / Business Process and Risks</td>
<td>• Information Technology</td>
</tr>
<tr>
<td>• Communication</td>
<td>• Financial Management</td>
</tr>
<tr>
<td>• Management / Leadership Principles</td>
<td></td>
</tr>
<tr>
<td>• IT / Business Continuity</td>
<td></td>
</tr>
<tr>
<td>• Financial Management</td>
<td></td>
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<tr>
<td>• Global Business Environment</td>
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</table>
**CAE Spotlight**

**Dan VanSciver**

Dan VanSciver is Senior Vice President and Chief Audit Executive for Sallie Mae, with over $25 billion in assets. Dan reports directly to the Audit Committee of the Board of Directors and administratively to Sallie Mae’s Chair and CEO.

“I’m proud of the work we do, making a big difference in the lives of students. Like a lot of people, I was the first in my family to graduate college. I know what it did for me, both professionally and personally, especially meeting the many great students and professors who have become lifelong friends and colleagues. I want other people to have those same experiences, to develop the close relationships, to have the confidence to enter the workforce, and to achieve great things in life.”

Dan has more than 28 years of accounting, finance, risk and audit experience, more than 15 of which have been in executive management roles. Prior to joining Sallie Mae in 2014, he held a variety of audit, finance, and risk management positions at PNC, ultimately overseeing all banking audit activities in the U.S., Europe, and Canada. He began his career at the international accounting firm, KPMG, before accepting senior finance positions at SEI Investments and Integrated Technologies Management.

A Delaware native, Dan holds a bachelor’s degree in accounting from the University of Delaware, and an MBA in international business from Villanova University. He also completed two executive training programs, one in Advanced Risk Management at The Wharton School of Business of the University of Pennsylvania, and the other in Advanced Management at Columbia University in New York. A Certified Public Accountant (CPA) and a Chartered Global Management Accountant (CGMA), Dan is a member of the American Institute of CPAs, Delaware Society of CPAs, and Institute of Internal Auditors. He currently chairs the Internal Audit Committee of the Consumer Bankers Association in Washington DC, serves on the Advisory Board of the John L. Weinberg Center for Corporate Governance, and volunteers with the Center for Economic Education and Entrepreneurship in their Keys to Financial Success Program delivered jointly by the Federal Reserve Bank of Philadelphia and the University of Delaware.

Dan received the Lammot duPont, Jr. Memorial Award from the American Red Cross in Delaware for outstanding and devoted service to the community. He also received the Patriot Award from the Office of the Secretary of Defense, Delaware’s Employer Support of the Guard and Reserves (ESGR).

Dan lives in Lincoln University, Pennsylvania with his wife of 28 years. Their two daughters are both pursuing medical degrees, including one who is currently serving on a medical mission trip for 9 months in Guatemala.

**Board Member Spotlight**

**Adam Ross**

Adam Ross is a Principal in Grant Thornton’s Advisory Services practice based in Philadelphia. He works with domestic and international companies across a variety of industries helping to enhance the efficiency and effectiveness of their business and IT environment, operations and organization structure, as well as increase awareness on risk, improve internal controls, and manage compliance with applicable laws and regulations. He also serves as a member of the IIA Philadelphia Board of Governors.

Adam has over 18 years of experience providing risk advisory and audit services, 10 of which working for Arthur Andersen and Ernst & Young. Adam has a BS in Business Administration from the University of Delaware, where he serves on the Advisory Board for
the Accounting and Management Information System (MIS) program. He also possesses the CISA and CIA certifications.

Adam learned the importance of building lasting relationships and delivering quality service from both of his parents, but specifically his father, who serves as a volunteer police officer in his hometown, and has been selling heating and air conditioning products for over 50 years. The call to service led Adam to join the IIA Chapter Board of Governors in 2018. His objectives for his board term are to increase member engagement, with a particular focus on increasing the custom experience for larger Internal Audit organizations in our region. He sees creating meaningful and impactful experiences for our membership as critical for the chapter’s success. His recommendation for members, especially newer ones, is to GET INVOLVED, build relationships and find opportunities to maximize membership experience. As with any organization, the more you put into it, the more you will get out of it.

New Member Spotlight
Victoria Johnson
Victoria Johnson has just started her internal auditing journey with the Information Security Audit Associates program with Wells Fargo’s Internal Audit department where she focuses on Enterprise Information Security Governance & Oversight, and the Information Security Portfolio Office. Her goal in the program is to strengthen her knowledge in the areas of risk management and issues management, ensuring that her processes and procedures in handling audits and validating corrective actions are efficient, effective and consistent in accomplishing organizational goals.

Victoria comes from a strong administrative and marketing background which helped prepare her for the field of audit having obtained both a B.B.A in Marketing and an M.S. in IT Auditing and Cyber Security from Temple University. Outside of work, Victoria has a history of expressing herself creatively, winning a district wide art contest at the age of 12 to visualize her newly built elementary school, a canvas still on display in the school today. She hopes to use her creative talent to learn and take advantage of opportunities to gain as much knowledge and guidance as she can.

Victoria’s aspiration is to take full advantage of the opportunities the IIA has to offer, including networking and making connections with IIA members in ways that will assist her in accomplishing her own career goals. Being a new entrant in the audit world, she would like to see the IIA provide a critical opportunity for senior audit leaders to partner with new audit hires in a mentoring capacity where career tips, guidance and suggestions are provided to help new hires understand the best methods for enhancing their own careers. Victoria views the IIA as a place to develop strong mentoring relationships which can help ease the strain and learning curve for new hires. This could possibly assist them to becoming comfortable with challenges they may face in their audit careers.

Member Spotlight
Matt Skala
Since joining the IIA in 2016, Matt has become an active member of the Philadelphia Chapter of the IIA through volunteering and attending events. Currently, Matt serves as the Co-Chair of the Academic Relations Committee (ARC). He recently attended the 2018 Internal Auditing Education Partnership Exchange in an effort to network with IIA members and college professors across the country to discuss the presence of internal audit on college and university campuses. Matt works alongside the other members of the ARC team with hopes to establish an Internal Audit Education Partnership (IAEP) program at a local
university. In addition, Matt has served in many volunteering roles for the chapter, including serving on the Spring and Fall 2018 Conference Planning Committees.

Matt is in his fourth year with RSM US LLP, currently serving in the Supervisor role within the Philadelphia Business Risk Consulting team. He is experienced in both internal audit and SOX compliance. His primary focus is assisting the Consulting team in accomplishing internal audit and SOX projects from the initial Risk Assessment phase through the testing and deliverables phase. In addition, Matt recently began serving in an external audit role performing walkthroughs and testing of internal controls over financial reporting for the firm’s audit team’s public clients.

Prior to joining RSM, Matt received his Bachelor of Science in Enterprise Risk Management from Pennsylvania State University. He is currently an Internal Audit Practitioner and will be sitting for the third part of the CIA Exam in December of 2018. In his free time, Matt enjoys exploring new places in the city and watching the Philadelphia Flyers. Matt looks forward to meeting other members of the IIA and becoming more involved in the Philadelphia Chapter.

Chapter Achievement Program (CAP) Report

The CAP report is a management tool used by Chapter Leadership to track service activities provided to our membership during the chapter year. Service categories eligible for CAP points include: Chapter Health, Service to Members, and Professionalism.

A minimum number of points are required within each of the categories for the Chapter to qualify for the various performance levels. The performance levels include: Bronze (685 points), Silver (1,060 points) and Gold* (1,560 points).

*Chapters earn
- Platinum by achieving Gold 10 out of 11 consecutive years;
- Ruby by achieving Platinum for 10 consecutive years;
- Sapphire by achieving Platinum for 15 consecutive years; and
- Diamond by achieving Platinum for 25 consecutive years.

Based on the dedicated service of our leadership and our members the Philadelphia Chapter has achieved a Platinum performance level since 2013!

All Chapter members can play a role in the Chapter’s success. By informing the Secretary when you participate in various activities specific to the “Service to Profession” category, this will help to increase our CAP point submission. The various activities include areas such as:

- Advocacy: Participation by any chapter member in a Junior Achievement Program / Event;
- Advocacy: Host an Internal Audit event at work, (i.e. Lunch and Learn);
- Advocacy: Schedule meeting with legislator or local politician to discuss IIA, legislation etc.
- Audit Executive Center (AEC): Contribute thought leadership to the AEC Knowledge Center;
- Certification: Participate in writing examination questions for the following IIA certifications: Certified Internal Auditor (CIA), Certified Financial Services Auditor (CFSA), Certification in Risk Management Assurance (CRMA), Certified Government Auditing Professional (CGAP), and Certification in Control Self-Assessment (CCSA);
- Editorial: Articles submitted to the Internal Auditor magazine;
- Editorial: Articles published in the Internal Auditor magazine;
- Editorial: Articles published in other professional journals;
- Speakers: Speaking engagements by chapter members both in and outside of the US, Canada, and the Caribbean. The chapter is eligible for CAP points as long as speaker is not
compensated. Additionally, presentations can be outside of the Internal Audit profession.

- Volunteerism: The Chapter will receive points based upon the percentage of volunteer growth annually.

If you have participated or plan to participate in any of the activities described above, during the period of June 1, 2018 through May 31, 2019 please communicate this information to the Chapter Secretary, Marc Lyman (secretary@phillyiia.org) and provide a brief description of the activity/event. If the activity is related to a speaking engagement please provide the date of the presentation, a brief description of the event/presentation, and the length of time you presented.

We appreciate your participation in helping the Chapter to once again achieve a Platinum status for this Chapter Year!

Some Lighthearted Internal Audit Humor 😊

Courtesy of CareersInAudit.com—www.careersinaudit.com

No, a tweet made up entirely of emojis is not sufficient documentary evidence!

Chapter Feedback

If you have any questions, suggestions, comments, or concerns please don’t hesitate to reach out to communications@phillyiia.org.

Career Opportunities

As a service to our Philadelphia Chapter membership we provide and maintain a Career page on our Chapter’s website allowing members who are in need of an opportunity (or a change of scenery) to pursue opportunities with local employers who are looking to fill their audit related staffing needs. This service has always been provided at no cost and viewed as a continuing benefit of membership in our Chapter. If you are looking to fill a staffing need, we can post your job opportunity(s) on our IIA Philadelphia Chapter website. The posting will remain active on our website for a period of three months (or until you inform us that the position has been filled). If you would like to extend the posting beyond three months, please let us know as we approach the end of the initial three-month period and your job opportunity will be renewed for an additional three months. For job seekers, here is the link to the Chapter’s website and current audit opportunities:

https://chapters.theiia.org/Philadelphia/Careers/Pages/default.aspx

If you are searching for staff, please supply your job opportunity(s) / description(s) in individual Word docs, including your contact information (i.e. name, title, email address, phone, etc.) with each; click on the career page to get an idea regarding format needs. Please contact Dave Aubrey, Chair, Employment Committee (djaubrey@msn.com) to post a position, or with any questions pertaining to employment and the Chapter Website’s Career page.

The Current Institute of Internal Auditors Philadelphia Chapter Board of Governors (2018-2019)

Bernadette Robinson  Kristen Herman
Maeve Raak       Robert Mainardi
Laurie Riggs     Jonathan Marks
Michael Levy     Tom McAllister
Peter Parillo    Sam Monastra
Marc Lyman       Normand Mullan
Jamal Ahmed      Margaret Neilon
Susan Allen      Alicia Preddy
Ken Brzozowski   Adam Ross
Monica DeBellis  David Small
Marie-Dominque Ortiz  Amit Varia
Bill Donehower  Warren Hersh
Joe Hayes

11
Save up to 25% on CPE Training with Freedom Pass Bundles

- SHARE credits among a group or team
- Forecast your training costs for the year
- Save money on training by LOCKING in a discounted price per CPE!

<table>
<thead>
<tr>
<th>BUNDLE SIZE</th>
<th>COST</th>
<th>COST PER CPE*</th>
<th>SAVINGS %</th>
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<tbody>
<tr>
<td>40 CPE CREDITS</td>
<td>$1,330</td>
<td>$33.25</td>
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<tr>
<td>80 CPE CREDITS</td>
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<td>160 CPE CREDITS</td>
<td>$4,760</td>
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<tr>
<td>320 CPE CREDITS</td>
<td>$8,400</td>
<td>$26.25</td>
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</tbody>
</table>

*Regular member cost of CPE is approximately $35 per CPE

For more information or to purchase, visit [chapters.theiia.org/Philadelphia/Events/Pages/Freedom-Pass.aspx](chapters.theiia.org/Philadelphia/Events/Pages/Freedom-Pass.aspx)

**Fine Print**
- Freedom Pass credits generally translate to CPE hours for each event, unless otherwise stated (i.e., 5 people attending an 8 CPE seminar is 40 Freedom Pass Credits);
- Freedom pass credits expire 18 months from date of purchase;
- Every Quarter, a statement providing the balance of used and purchased Freedom Pass credits will be provided to each account holder;
- Freedom Pass bundles must be purchased by a member of the Philadelphia Chapter of the IIA; and
- Most programs offered by the Philadelphia Chapter of the IIA are eligible to be purchased using Freedom Pass credits.

For further details, reach out to programs@phillyiia.org