



Planned Giving & Trust Services Portal

Overview

All Planned Giving and Trust Services (PGTRS) certified personnel are required to complete Continuing Professional Education (CPE) and report their number of CPE hours to the North American Division PGTRS department to maintain their certification. All CPE hours are to be reported using the [PGTRS Portal](#), there is no other way you may submit your CPE.

CPE Policy

Beginning January 1, 2018, and each calendar year thereafter, all personnel shall complete a minimum of sixteen (16) hours of continuing professional education (CPE) during each calendar-year period, to maintain certification. Fifty (50) minutes of continuing professional education will be credited as one (1) hour of CPE credit.

MAKE-UP PROVISION FOR CPE HOURS. If the required CPE hours in any one calendar year are not completed by a certified PGTRS individual, they will maintain their certification and have the next calendar year to acquire the required (16) hours for the current year plus the hours that were short in the previous year. (note: current year hours must be completed first and then the make-up hours)

CPE Reporting Procedures

1. First time users click on this link, [PGTRS Portal Registration](#), to setup your password for the website.
 - a. At the registration website submit the email address in which you have received correspondence (such as the Quarterly Newsletter) from the NAD PGTRS Department.
 - b. An email will be sent to this address with a link to set your password.
 - i. The password must be at least six characters and be a mixture of letters, numbers and special characters.
 - c. After setting your password you will login to the PGTRS Portal. If you enter the incorrect password more than five (5) times your account will be locked out and you will need to contact Gwen Bravo at bravog@gc.adventist.org for assistance.
 - d. The first thing you will need to do is confirm your email address that you wish to receive correspondence from the NAD PGTRS Department. If you wish to change this email address you may do so on the "Edit My Details" page.
2. Once you gain access to the website please verify all your information by clicking on the button "Edit My Details".

- a. There you may review and edit your name, greetings name, email, phone numbers, and mailing address if it is different from your employing organization's address.
3. Before entering your CPE hours, you may wish to review your CPE History to see what has been reported to the NAD PGTRS Department in the past.
4. To enter your CPE, click on the link on the left-hand side titled "Enter CPE Hours".
 - a. Under CPE Description, on the blank line, enter a brief description of the CPE you completed.
 - b. Enter the date the CPE was completed.
 - c. Enter the total CPE hours earned.
 - d. Click add and you will see the totals at the bottom of the page update.
 - e. You may enter your CPE Hours at any time throughout the year.
5. You must enter all your CPE for the previous year by January 31st.
 - a. After January 31st you will not be able to enter your CPE for the previous year.
 - b. Starting on February 1st your CPE approving authority, which is usually your Union PGTRS Director, will approve or deny the CPE you've submitted thereby finalizing your CPE record.
6. If after your CPE has been approved you have a deficiency in the number of required CPE credits you will receive a notification from the GC/NAD PGTS department letting you know how many CPE credits you will need to make up after you have completed all of the CPE credits for the current year.
7. Any questions regarding this CPE reporting process can be directed to bravog@gc.adventist.org.