

Summary of Certification Classifications

INACTIVE CERTIFICATION – This classification was created to allow those who are retired, or no longer working in PGTS, to keep up their CPE and get back into PGTRS work if the opportunity ever arises.

When a PGTRS certified person is no longer engaging in PGTRS work, or they are not employed by an accredited organization, they may maintain an inactive certification by continuing to complete the required 16 hours of CPE annually and attending all GC/NAD and Union sponsored training seminars. An individual who has an inactive certification may become actively certified by notifying the Director of the GC/NAD PGTRS Department that they are employed by an accredited organization and they are engaged in planned giving and trust services development or management activities.

LAPSED CERTIFICATION – This classification was created to identify someone who has failed to meet the annual CPE requirements, stipulate they can no longer engage in any planned giving and trust services activities, and specify how the individual can get back to an active certification.

If the required CPE hours in any calendar year are not completed by an individual with active PGTRS certification, the individual will maintain their active certification and have the next calendar year to acquire the required 16 hours for the current year, plus the hours that were deficient from the previous year. CPE hours from the current year must be completed before the deficient hours from the previous year may be completed.

When a PGTRS certified person fails to complete 16 hours of CPE in a calendar year as well as any deficit of CPE hours from the previous year, their active certification will be reclassified as lapsed certification on January 1. PGTRS personnel with a lapsed certification is prohibited from engaging in any planned giving and trust services development or management activities for any NAD Organization.

To become actively certified again the lapsed certified individual must make up all CPE hour deficiencies before they can again be granted active certification and engage in any planned giving and trust services development or management activities for any NAD Organization.

Lapsed Certification for Those Not Employed by an SDA Organization or Not Engaged in PGTS –

Personnel with lapsed certifications who are not employed by an accredited organization or were not engaging in PGTS must, before becoming actively certified, complete 16 hours of CPE before they can engage in any planned giving and trust services development or management activities for any NAD Organization. Upon returning to active certification, in addition, the individual must satisfactorily complete the annual CPE requirement for that calendar year.

REVOKED CERTIFICATION – This classification was created to specify what training someone who has not been certified for more than five years must undergo before becoming actively certified again.

Individuals deemed to be lapsed certified personnel for 3 calendar years or more (which would have been preceded by at least two years in which they were actively certified but not meeting all the CPE

requirements before they were classified as lapsed) will be deemed to have a revoked certification. To return to active certification the revoked certified personnel must retake and satisfactorily complete the NAD Introduction to Planned Giving & Trust Services Certification Course and complete eight hours of orientation in Planned Giving and Trust Services Department of a Level A accredited organization other than their employing organization.