



CRC® Committee Volunteer Opportunities Application Form



International Foundation for Retirement Education

CRC® Committee Volunteer Application

InFRE relies on the expertise of active CRC® Certificant volunteers to help us maintain a highly credible CRC® program and to meet ongoing National Commission for Certifying Agencies (NCCA) accreditation requirements. All committees meet via teleconference and no travel or in-person meetings are required. As a token of our appreciation for volunteering your time, several of the committee assignments will allow you to earn CRC® continuing education credit. All information submitted in the application will remain confidential. For questions about volunteer opportunities contact Kevin Seibert, 847-756-7350 ext. 132.

To complete the application save it to your desktop. Provide the information requested and answer all the questions as best as you can. Please indicate all the CRC® committees for which you may have an interest in serving as a member.

Submit your completed application and any attachments to ksmith@infre.org

Part I: Background Information

SECTION I: Contact Information

Name: _____ Email: _____
Business Name: _____ Job Title: _____
Business Address: _____ Date Started with Company: _____

Home Address: _____

Phone: _____

SECTION II: Educational Degrees

Degree: _____	Date Received: _____	College or Institution: _____
Degree: _____	Date Received: _____	College or Institution: _____
Degree: _____	Date Received: _____	College or Institution: _____

SECTION III: Professional Designations

Designation: _____	Date Received: _____	Granting Organization: _____
Designation: _____	Date Received: _____	Granting Organization: _____
Designation: _____	Date Received: _____	Granting Organization: _____

SECTION IV: Licenses Held

License: _____	Date Received: _____	Granting Organization: _____
License: _____	Date Received: _____	Granting Organization: _____
License: _____	Date Received: _____	Granting Organization: _____

Have you ever had a license relinquished or revoked? ☐ Yes ☐ No ☐ N/A If 'yes', please explain in the space below or on an attached sheet.

SECTION V: Previous Volunteer Service

Please list previous InFRE or related professional/association/industry/community volunteer service including positions held if any:

Organization	Service/Position Held	Start Date	End Date	Reference Names and Phone Numbers

SECTION VI: Background and Qualifications

1. Which of the following CRC® stakeholders do you represent (specify one):
 - ☐ **Financial Advisor** - work directly with individual clients to provide any one or more of financial advice, investments, insurance, or tax preparation
 - ☐ **Retirement Plan Provider** - work primarily with defined contribution plan participants
 - ☐ **Public Sector Retirement Plan Counselor** - employed by a public employer-sponsored retirement plan
 - ☐ **Other** – Please specify below
2. Briefly describe your current professional position:
3. Briefly indicate any unique qualifications or experience you may have for serving on a CRC® committee:
4. How many years of retirement-related profession experience do you have?

SECTION VII: Disclosure of Complaints Current and Past

Are you, or have you ever been, under notice as to any complaints by clients or any regulatory agency which have led or may lead to legal or disciplinary actions?

- ☐ Currently ☐ Have Been ☐ No

If you are currently under notice or you have been in the past, please briefly explain:

SECTION VIII: Volunteer Opportunities

Please check all the volunteer CRC® committee opportunities for which you are interested in serving.

- ☐ **CRC® Board of Standards and Policy Development** - The CRC® Board of Standards and Policy Development (BOS) purpose is to establish the governing rules and regulations related to the Certified Retirement Counselor® (CRC®) certification program, make determinations regarding eligibility and all essential certification decisions, and provide mediation and interpretations for the program. The BOS meets via teleconference on a quarterly basis and as needed. A BOS term is for three years and members receive a waiver on their annual CRC® renewal fees during their term. Note: CRC® Certificants typically serve on one or more of the other CRC® committees before being invited to be a member of the BOS.
- ☐ **CRC® Practice Analysis Committee** - To develop exams that reflect the current practice of retirement planning, InFRE, along with the CRC® Practice Analysis Committee, periodically conducts a retirement profession practice analysis by reviewing the typical tasks performed by retirement counselors. The resulting [CRC® Test Specifications](#) become the blueprint for constructing the CRC® examination. InFRE's testing agency facilitates all committee meetings and related activities using psychometrically sound methodologies. Generally, the practice analysis study is conducted once every five years. CRC® Practice Analysis Committee members receive 10 hours of CRC® continuing education credit and a waiver on the annual CRC® renewal fees for two years.
- ☐ **CRC® Item Writing Committee** - Exam developers refer to exam questions as items. To ensure the CRC® examination is continually kept up-to-date and relevant, item writing is one of our ongoing processes. Members of the CRC® Item Writing Committee are asked to write a specific number of items (typically between 5 and 10) in content areas that are needed. Prior to writing items, committee members participate in an item writing workshop that orients them to the item writing process and ensures they are trained on how to write effective items. CRC® Item Writing Committee members receive ½ hour of CRC® continuing education credit for each item submitted and a waiver on the next CRC® annual renewal fee payment.
- ☐ **CRC® Item Review Committee** - Each item submitted by the CRC® Item Writing Committee is reviewed by InFRE's testing agency to ensure it meets best practice construction guidelines. Items are then reviewed by CRC® Item Review Committee members for content accuracy and clarity under the guidance of testing agency staff. CRC® Item Review Committee members receive two-hours of CRC® continuing education credit.
- ☐ **CRC® Exam Committee** - InFRE directs our testing agency to periodically construct and assemble a new test form for the CRC® examination. The draft form is then reviewed by the CRC® Exam Committee during an exam construction meeting. During the meeting, committee members review the items/exam questions according to preestablished guidelines and approve the content of the examination before it is finalized. CRC® Exam Review Committee members receive 6 hours of CRC® continuing education credit.
- ☐ **CRC® Standard Setting Committee** - A standard setting study/pass point is conducted for the first CRC® examination administered following a new practice analysis to ensure that pass/fail decisions are based on sound psychometric practice. The study must be conducted by a panel of retirement planning subject matter experts (CRC® Standard Setting Committee) who serve as judges and work under the guidance of InFRE's testing agency to determine an appropriate pass point for the CRC® examination. CRC® Standard Setting Committee members receive 4 hours of CRC® continuing education credit.
- ☐ **CRC® Appeals Committee.** The Appeals Committee considers and makes determinations on appeals made by candidates or certificants. Appeals Committee members cannot simultaneously serve on the BOS or any of the CRC® examination related committees.

Volunteer Application Form

Part II: Open-Ended Questions

SECTION IX: Open-Ended Questions

Please a short paragraph response to each of the following open-ended questions (question 4 is optional).

1. Why are you interested in serving as a CRC® committee volunteer?
2. Do you have any past volunteer experience, or have you served as a member of a corporate board? Please provide a brief description of past volunteer experiences or board service.
3. Do you think you may have any conflicts of interest, current or anticipated, in regard to serving on a CRC® committee?
4. Is there any other information you would like to provide?

SECTION X: Acknowledgement and Submittal

I agree that everything on and attached to this form is correct and accurate to the best of my knowledge.

Signature: _____ Date: _____

Please feel free to attach your bio/resume to this application. Email your application and any attachments to ksmith@infre.org.

We appreciate your interest in serving on a CRC® committee and look forward to reviewing your application.