

McConnell Jones CPE Policies

Record Retention Policy

Under McConnell Jones' ISO 27001 Policies and Controls Compliance, Section 18.1.3, "Protection of Records" Business Records, general business correspondence information is retained for 5 years This includes the following documentation:

- Records of Participation
- Dates and location of program offerings
- Author/instructor, author/developer and reviewer names and credentials
- Number of CPE credits earned by participants
- Results of program evaluations
- Program descriptive materials (course announcement information)

In addition, the following documentation will be maintained without lapse:

- The state of licensure, license number and status of the CPA and tax attorney acting as an author/instructor, author/developer and reviewer for accounting, auditing or tax program(s), license shall be maintained.
- For the enrolled agent acting in such capacity for tax program(s), information regarding the enrolled agent number shall be maintained.

Refund Policy

Refunds shall be provided to attendees who provide notice at least 24 hours before the scheduled event. Refunds will not be provided after this time.

Additional information for refund requests can be found on the McConnell Jones Webpage here:

<https://mccconnelljones.com/sample-page-2/cpe-policies-and-information/>

Cancellation Policy

Cancellations or changes to event scheduling will be communicated via email from info@mjlm.com at least (TBD) Days before the scheduled event.

Complaint Resolution Policy

Complaints regarding programs can be directed to:

Patrick Plant, Marketing Coordinator
info@mjlm.com
(713) 252-6790