

A Step by Step Guide to Online Registration

Our online registration system is easy and convenient! If you're new to our system, read below to give you a little guidance through the process.

Emails.

Emails are sent from the address clientfirst@clientfirst.com. Please add this email to your whitelist to ensure you receive the emails.

Below are the emails we send for each event.

Email	Frequency	Recipient	Action
Invitation	Once	All Invitees	Yes to Register, No to Decline*
Invitation Reminder(s)	Every 6-10 days	Invitees who have not responded.	Yes to Register, No to Decline
"Last Chance" Reminder	Once. The morning of the RSVP date.	Invitees who have not responded.	None needed. This is the last email invitation of this event.
Registration Confirmation	Once. Automatic email once "FINISH" is clicked on the registration page.	Accepted	None.
Event Reminder	Once. Day before the event.	Accepted	None.
Cancellation Confirmation	Once	Cancelled.	None.
Regret	Once. When "No" is clicked to Decline.	Declined	None.

Depending on the format that your email client accepts, emails will arrive in one of two ways.

- ☞ If you are able to receive HTML emails, a graphic enhanced invitation will appear, allowing you to click the "yes" or "no" button directly from your email.
- ☞ If your email server does not accept HTML, you will receive a text email with a link directing you to the online invitation.

At this point, you can respond one of three ways.

- ✓ **Respond YES.** You'll be directed to a registration page. You MUST fill out the appropriate information and click "FINISH" at the end to register. Only clicking "Yes" will not complete your registration (details on registration found later on this page).
- ✗ **Respond NO.** Of course we realize that sometimes you won't be able to join us. If this is the case, simply click the NO button. **This will stop ANY FURTHER EMAILS associated with this event.** You'll be directed to a survey page. This is completely optional, although it does help us in scheduling future events – whether we need to change the location, time, etc.
- 🔗 **Event Summary.** If you need to know more, simply click the "VIEW EVENT SUMMARY" link. This will lead you to more details on the event. Many times, information is separated into different pages, including Fees, Agenda, Speakers and More.

Website.

Depending on event, the event website may include several pages. You will find a list of the pages available in a menu to the left or top of the page. Included in this menu is a register button. No matter which page you navigate to, this menu will remain and you may register at any time. Below is a list of pages that may be a part of each event.

- **Event Summary.** This page is included in EVERY event listed. Included in the summary is class information and navigation to future pages. The details section of this page includes: the Date/Time of the event, an "Add to Calendar" option, the location, Planner name/email and applicable websites.
- **Invitation.** This page generally contains the same information as the Event Summary. This page purely exists as a landing page for those who do not accept HTML emails.
- **Event Fees.** If applicable, the cost(s) for the event will be listed on this page. If there is no FEES page listed, the event is free of charge.
 - **NAIFA.** We provide registration for many chapters of the National Association of Insurance and Financial Advisors (NAIFA), the cost of these events are set by the association. You will be asked to choose the price category you belong to, this is on the honors policy for online registration. If you would like information about NAIFA membership or if you are not a member, please email clientfirst@clientfirst.com and we will contact the appropriate person to get in touch with you.
 - **Client First.** If fees are applicable, Client First offers FREE CE to those reaching Associate Producer or Active Producer Status.
 - **Associate Producers** include past convention qualifiers (as of 2003), Top Gun award winners (as of 2003), agents in the Dedicated Producer program, agents qualified for the 2009 Vacation Incentive Program and selected agents based on past and projected performance. This privilege DOES NOT apply to staff members of the Associate Producer. Associate Producers will automatically be charged the appropriate rate when signing in with their email address as it is on file with Client First. Please call your Sales Manager for details.
 - **Active Producers** include the any agent who has issued business through Client First in the last 12 months. All lines of business qualify. This privilege DOES NOT apply to staff members of the Active Producer. Active Producers will automatically be charged the appropriate rate when signing in with their email address as it is on file with Client First. Please call your Sales Manager for details.
 - **Other.** On some occasions we will provide Online Registration for an event that is neither a Client First event nor a NAIFA event. The Fee structure is determined by the sponsoring organization (such as Capital I Day) and fees will be posted accordingly.
- **Agenda.** Some events have multiple classes per day. In this case, the agenda page will be present. This lists the classes in the day by time with details listed.
- **Speaker Spotlight.** When made available, this page will include the speakers' bio.
- **And More...** Depending on event, additional pages may be added to further explain the event.

Registration Process.

The registration process could not be any easier! This is especially true if you proceed to it directly from the email or link we sent to you. When you do this, any information already in our database is auto-populated in the fields provided, making the process even FASTER for you!

- **Enter your Registration Information.**
 - Click REGISTER.
 - Complete the IDENTITY CONFIRMATION page and click **NEXT**.
 - Complete the PERSONAL/CONTACT INFORMATION sections and click **NEXT**.

- **If Applicable, Select Your Sessions.** This page will only be present if there are multiple classes offered during the day. You must choose a minimum of 1 course to register.
 - Complete the SELECTION page by choosing the classes you wish to attend and click NEXT.
 - This will bring you to what is titled the GROUP REGISTRATION page. When entering a single registration, click NEXT and continue to the SUMMARY/PAYMENT page.
 - To register another person along with you, click the “Add Another” button and repeat the process with their information. At the end of the registration, they will receive their own confirmation number and email.
 - Your registration will be listed on the top of the page.
If anything is incorrect, click the PREVIOUS button towards the bottom of the page.

- **If applicable, Make a Payment.**
 - Scroll to the PAYMENT section.
 - Choose Credit Card or Check.
 - **Credit Card.** Enter you card number, expiration date, security code and billing address.
 - **Check.** Please write the Event Title, Confirmation # and/or the names of the attendees in the memo of the check so we know where to distribute the funds.
Make Payable to: Client First
And Send to: 303 West Allegheny Avenue Towson, MD 21204
Be sure to click FINISH to complete your registration.

You will land on the MY REGISTRATION/CONFIRMATION page. This contains your confirmation number and a link of the left to modify your registration. This confirmation will also be sent to you at the email address provided. Keep this email handy to view, modify or cancel your registration.

For more information, Continuing Education Online Registration – FAQs [\(link to\)](#)



1-800-966-1495
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