

## WWBA CLE APPROVAL INSTRUCTIONS - 60 DAYS BEFORE THE PROGRAM

Materials should be submitted in separate emails as outlined below.

### Email #1

- 1) CLE Checklist (obtain form from website below)
- 2) Course Flyer – must be approved
- 3) Timed Agenda – 10 minute or less increments – Q&A, Introductions don't count - 50 minutes needed per credit
- 4) Sign-In Sheet (in-person program) or Attorney Affirmation (zoom program) – obtain form from website (see below) – enter program name on top
- 5) Course Evaluation Sheet – obtain form from website – add program and speaker names

### Email #2

- 1) License to Publish from each speaker including moderator
- 2) Bios/CVs from each speakers including moderator
- 3) Copyright and/or permission letters for printed materials and case law

### Email # 3

Original speaker materials and/or power points prepared and dated for this CLE

### Email # 4

Any additional program handouts or miscellaneous materials not covered above

### General Guidelines and Forms

Checklist, forms, and general guidelines for obtaining CLE can be found:

WWBA website at Home/Resources/Program Guidelines/Planning A CLE

WBASNY website at <https://www.wbasny.org/cle/guidelines/>

Submit all materials to:

[Ann.M.McNulty@MorganStanley.com](mailto:Ann.M.McNulty@MorganStanley.com) (Office Phone 212-692-2952)