

RSS Reporting Requirements Checklist for the 2024-2025 Certification Year

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Planner Presenter Financial Relationships Forms Presenter Content Forms Presenter Content Forms Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed) Excel attendance spreadsheet Maintenance of Certification (MOC) records (if applicable) Commercial Support Letter of Agreement (if applicable) October, November, December 2024 (Quarter 2) due January 31, 2025 Disclosure to Learners Slides/Forms for each RSS Session Planner Presenter Financial Relationships Forms Presenter Content Forms Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed) Excel attendance spreadsheet Maintenance of Certification (MOC) records (if applicable) Commercial Support Letter of Agreement (if applicable) **2025-2026 Activity Development Form ** due April 30, 2025 January, February, March 2025 (Quarter 3) due April 30, 2025 Disclosure to Learners Slides/Forms for each RSS Session Planner Presenter Financial Relationships Forms Presenter Content Forms Mitigation of Relevant Financial Relationships Form for Planners, Presenters, Others (if needed) Excel attendance spreadsheet Maintenance of Certification (MOC) records (if applicable) Commercial Support Letter of Agreement (if applicable) Commercial Support Letter of Agreement (if applicable) April, May, June 2025 (Quarter 4) due July 31, 2025 Disclosure to Learners Slides/Forms for each RSS Session Planner Presenter Financial Relationships Forms Presenter Content Forms Mitigation of Relevant Financial Relationships Forms Presenter Financial Relationships Forms Presenter Content Forms	July, August, September 2024 (Quarter 1)	due October 31, 2024
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