

# NACM Career Roadmap

To submit this Roadmap:

1. You must be registered with the NACM-National Education Department.
2. Attach the appropriate designation application and fee to this Roadmap.

Please read all instructions carefully before completing this form. Please enter your self-score for each item in the box. Points may be earned in any of the three sections, with no minimum or maximum needed in any one section. Please be sure to sign the Roadmap once completed. It must be signed to be evaluated. Make a copy of your completed Roadmap for your personal records.

Mr. or Ms. \_\_\_\_ First Name: \_\_\_\_\_ Middle or Maiden: \_\_\_\_\_ Last Name: \_\_\_\_\_

Birth Month/Day (MM/DD): \_\_\_\_\_

Check the designation for which you are applying:

- CBF<sup>SM</sup> 75 Documented Roadmap Points, having earned the CBA<sup>SM</sup> and completed the two course requirements
- CCE<sup>®</sup>  Plan A: 125 Documented Roadmap Points and having earned the CBA<sup>SM</sup> and CBF<sup>SM</sup>
- Plan B: 125 Documented Roadmap Points, 10 Years Experience and having earned a four-year college degree
- Plan C: 125 Documented Roadmap Points, 15 years experience and 57 years of age or older

## Section I - Education

\_\_\_\_\_ **A. Undergraduate Courses** (1 point per 3 credit hours / 40 points max)  
points

**Graduate Courses** (2 points per 3 credit hours / 30 points max)

Record courses taken beyond high school. This includes courses taken at degree-granting institutions only. Points will be granted even if a degree was not earned. Official grade transcripts must be sent by the university or college to the NACM-National Education Department to document these points.

Institution	Degree/Major	Credit(s)	Date
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

\_\_\_\_\_ **B. NACM Formal Programs** (60 points max)  
points

- NACM In-House Certificate Sessions (10 points each)
- Legal Workshops (3.5 points each)
- Graduate School of Credit & Financial Management<sup>®</sup> (GSCFM<sup>®</sup>) (30 points for completing the full program; 10 points per year attended if you did not complete the program)

Program	Location	Year Completed
_____	_____	_____
_____	_____	_____
_____	_____	_____

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- \_\_\_\_\_ **C. CBF Required Courses** (1 point per course / 2 points max)  
points Record Business Law and Credit Law courses taken through NACM-National or through an NACM local Affiliate or through a college or university. Official transcripts must be received for verification purposes.

Course Name	Sponsor/Location	Grade	Date
_____			
_____			
_____			
_____			
_____			

- \_\_\_\_\_ **D. Self-Study Courses** (1 point per course / 20 points max)  
points Self-study courses are taken at your own pace outside of school and are sponsored by NACM, professional associations or organizations. Attach a copy of your course certificate(s) as documentation of your successful completion of each course.

Course Name	Sponsor/Location	Total Hours/CEUs Earned	Grade	Date
_____				
_____				
_____				
_____				
_____				

- \_\_\_\_\_ **E. Continuing Education at Conferences, Seminars and Meetings**  
points (0.1 point per 1 hour/ 40 points max)  
This includes continuing education received at locally, regionally or nationally sponsored educational gatherings, as well as employee-sponsored training. All continuing education points are based on session content, session length and your attendance. For every hour of continuing education you receive, you may award yourself 0.1 CEU. You may earn fractions of points. Please attach evidence of CEUs earned, or a copy of the educational offering brochure or meeting notice for each entry. Use the Supplemental Information section on the last page if more space is needed.

Event Name	Event Sponsor	Location	Date	CEU
_____				
_____				
_____				
_____				
_____				
_____				

\_\_\_\_\_ **F. Completion of NACM CAP Program (10 points)**  
 points *Applicable only if all required CBA courses are completed through your local NACM Affiliated Association.*

\_\_\_\_\_ **G. Completion of NACM ACAP Program (15 points)**  
 points *Applicable only if all required CBF courses are completed through your local NACM Affiliated Association.*

**H. Achievement of the of the NACM/FCIB Designations:**

\_\_\_\_\_ **CBA<sup>SM</sup> designation (8 points)**  
 points List date earned: \_\_\_\_\_

\_\_\_\_\_ **CBF<sup>SM</sup> designation (5 points)**  
 points List date earned: \_\_\_\_\_

\_\_\_\_\_ **CCRA<sup>SM</sup> designation (3 points)**  
 points List date earned: \_\_\_\_\_

\_\_\_\_\_ **CICP<sup>SM</sup> designation (5 points)**  
 points List date earned: \_\_\_\_\_

\_\_\_\_\_ **Section I Subtotal**  
 points

**Section II - Work Experience and Special Interests**

\_\_\_\_\_ **A. Work Experience (2 points for each year of experience / 40 points max)**  
 points Points are granted for your business credit and financial management related full-time work experience. Because a maximum of 40 points may be earned, if you have more than 20 years experience in the field, list your most current experience. Please attach a current resume if it is not already on file.

Employer	City/State/Province	Position/Title	Dates

Total number of years experience in credit management: \_\_\_\_\_

**B. Service as a Mentor** (5 points for each mentee / 5 points for each award / 30 points max)  
 points If you have served as a mentor, please list the name(s) of the people you have mentored. Mentoring can include training or coaching new employees. Please attach a typed 250-word or less statement describing how you served as the mentor to each person listed below. If the individual you have listed as a mentee achieves either the CCRA<sup>SM</sup>, CBA<sup>SM</sup>, CBF<sup>SM</sup> or CCE<sup>®</sup> designation, you may claim 5 points for each award.

Mentee's Name	Mentee's Company	Mentee's Telephone Number	Mentee's Certification Date

         **C. Instructor at a Degree-Granting Institution or a Non-Degree Program**  
 points (5 points for each course / 15 points max)  
 If you have taught (full or part-time) at a degree-granting institution or are an instructor for an NIC, CAP or ACAP program, you may receive credit in this section. Please attach copies of the course brochures listing you as an instructor or have the course sponsor verify your service by letter.

College/University	Location	Title of Course Taught	Course Hours	Year

         **D. Panelist or Speaker** (1 point for each 2 hours of speaking / 15 points max)  
 points If you have served as a panelist or speaker at a conference, seminar or meeting, you may award yourself one point for every two hours of speaking. Please list different speaking engagements separately. Please attach documentation of each item listed. Copies of a brochure, meeting notice or a letter from the event sponsor are acceptable documentation.

Program Sponsor	Session Name	Session Length	Location	Date

         **E. Articles Published** (5 points for each article / 20 points max)  
 points The article must pertain to credit, finance or business, be published and must be at least 250 words or more. Articles may appear in in-house publications, newsletters or *Business Credit* magazine. Unpublished papers and manuscripts do not qualify. Attach a copy of the article(s) to this form.

Publication Name	Title of Article	Date

\_\_\_\_\_ F. **Special Consideration** (5 points max)  
 points Please describe special career accomplishments for consideration in this section. You may describe any work, procedure, policy or accomplishment for which you have been personally responsible. The accomplishment must be related to an improvement in the business credit and financial management field. If necessary, describe the item for special consideration on a separate sheet and attach it to this form. Qualification and final point value will be determined by the NACM-National Education Department.

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\_\_\_\_\_ G. **Volunteer and Community Service** (1 point per year / 5 points max)  
 points List any religious, civic, fraternal or charity work you have performed. Please provide details below.

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\_\_\_\_\_ **Section II Subtotal**  
 points

**Section III - National, Local and Regional Participation**

Participation points include national, regional NACM Affiliate activities and local CFDD Chapter activities. This section may be sent to the appropriate NACM or CFDD representative for verification.

\_\_\_\_\_ A. **Volunteer National and Local Executive Service** (60 points max)  
 points Volunteer executive service includes your service to national or local committees, task forces or board of directors. List service within the past five years.

- Service as a National Committee or Work Group Member (3 points for each term / 15 points max)
- Service as a National Committee or Work Group Chair (4 points for each term / 20 points max)
- Service as a Member of a National Task Force (4 points for each term / 20 points max)
- Service as a National Task Force Chair (5 points for each term / 20 points max)
- Service as a Member of a National Board of Directors (5 points for each term / 30 points max)
- Service as a Director of a National Board of Directors (6 points for each term / 24 points max)
- Service as an Officer of a National Board of Directors (7 points for each term / 28 points max)
- Service as the Chair of a National Board of Directors (10 points for each term / 30 points max)
- Service on a local Committee or Work Group (2 points for each term / 20 points max)
- Service as a local Committee or Work Group Chair (3 points for each term / 21 points max)
- Service on a local Board of Directors (4 points for each term / 12 points max)
- Service as an Officer of a Board (5 points for each term / 10 points max)
- Services as a local Chairman or CEO of a Board (5 points for each term / 10 points max)

Sponsor	Board/Committee/Group Name	Position	Term Served	Points

**B. Attendance at Nationally, Regionally or Locally Sponsored Educational Events**

points

(75 max)

List events attended within the past 5 years. If necessary, list additional events on a separate sheet and attach.

- Participation in National Events (5 points each)
- Participation in Regional or Local Events (3 points each)

Sponsor	Event Name	Location	Date

         **C. Participation in Audio Teleconferences or Web Seminars** (1 point each / 15 points max)

points

List locally sponsored audio teleconferences or web seminars in which you have participated. You must be the registered participant to receive points. Your name will be verified through the program's attendance roster.

Sponsor	Event Name	Speaker Name	Date

         **D. Industry Credit Groups**

points

Points are awarded for your participation in, and service to, local, regional or national industry credit groups. List meetings attended and service to industry credit group committees within the past 5 years. If necessary, list additional entries on a separate sheet and attach to this form.

- Participation in Industry Credit Groups (1 point for each year / 15 points max)
- Service as a local, regional or national credit group committee member (2 points for each year / 10 points max)
- Service as a local, regional or national credit group committee chair (3 points for each year / 9 points max)


         **E. Honors, Awards and Achievements** (1 point per award)

points

List any national, local or regional awards received or presented personally to you during your career. The honors and awards must be related to the field of business credit and financial management. Examples are National or Local Credit Executive of the Year and Employee of the Month or Year. Please attach either a copy of the certificate or a letter stating your achievement from the award sponsor.

Award Sponsor	Name of Award	Date Received

\_\_\_\_\_ F. **Contributions to *Business Credit Magazine*** (1 point per article)  
points List *Business Credit* articles that you have contributed to in the last five years. Attach a copy of the article(s) to this form.

Article Title \_\_\_\_\_ Publication Date \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ G. **Participation in National Surveys** (.1 point per each survey instance / 10 points max)  
points List any nationally sponsored surveys in which you participated in the last five years (e.g., Credit Managers' Index, Business Credit Compensation Study, NACM Monthly Survey, etc.).

Survey Name \_\_\_\_\_ Number of Instances \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ H. **Corporate Accounts Receivable Data Sharing/Contribution**  
points (1 point per year / 5 points max)  
If your company contributes its Accounts Receivable Data to an NACM Affiliate credit reporting database, your company is contributing to the welfare of the business community. One participation point per year for full file contribution.

Name of NACM Affiliate receiving your data contribution: \_\_\_\_\_ Dates of Contribution \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_ **Section III Subtotal**  
points

**Section IV - Roadmap Summary**

**Section I - Education:** \_\_\_\_\_ points

**Section II - Work Experience and Special Interest:** \_\_\_\_\_ points

**Section III - National, Local and Regional Participation:** \_\_\_\_\_ points

**TOTAL ROADMAP POINTS:** \_\_\_\_\_ points

I hereby submit this Career Roadmap for evaluation and verification by the NACM-National Education Department. I fully understand that the Department will verify the claims made for points herein. I understand that any false statement or misrepresentation that I make in the course of these proceedings may result in the revocation of this application and prohibit me from participating in the professional certification program.

Signature \_\_\_\_\_ Date \_\_\_\_\_

