

# NACM Career Roadmap

Submit to: NACM Education Dept., 8840 Columbia 100 Parkway, Columbia, MD 21045-2158

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./Ms.

First Name

Middle or Maiden Name

Last Name

Birthday (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 and CBF
- ☐ 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

points

A. Undergraduate Degree (40 points)

Graduate Degree (30 points)

If no degree was earned, then take 1 point per 3 credit hours. Official grade transcripts must be sent by the university or college to the NACM-National Education Department to document these points.

Institution	Degree/Major	Date

points

B. NACM Formal Programs (60 points max)

NACM In-House and Credit Congress Certificate Sessions (10 points each)

Graduate School of Credit & Financial Management<sup>®</sup> (GSCFM<sup>®</sup>) (5 points)

Program	Location	Year Completed

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points

C. CBF Required Courses

(1 point per course/2 points max)

Record Business Law and Credit Law courses taken through NACM’s Credit Learning Center, an NACM Affiliated Association or college or university. Official transcripts must be received for verification purposes.

Course Name	Sponsor/Location	Grade	Date

points

D. NACM Credit Learning Center and Self-Study Courses

(1 point per course/20 points max)

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

points

E. Continuing Education at Conferences, Seminars and Meetings, nationally sponsored Thought Leadership Group participation and Webcast Plus

(0.1 point per 1 hour/40 points max)

This includes continuing education at in-person sessions, Webcast Plus webinars and nationally sponsored Thought Leadership Group. 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. If you attended an employer-sponsored session, please attach evidence of your attendance and a copy of the educational offering brochure or meeting notice. Use the supplemental Information section on the last page if more space is needed. You may earn a max of 5 points through Webcast Plus.

Event Name	Event Sponsor	Location or Webcast Plus	Date	CEU

points

F. Completion of NACM CAP Program (10 points)

Applicable only if all required CBA courses are completed through your local NACM Affiliated Association.

points

G. Completion of NACM ACAP Program (15 points)

Applicable only if all required CBF courses are completed through your local NACM Affiliated Association.

points

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

Designation Earned

Date Earned

☐ CBA designation (8 points)

☐ CBF designation (5 points)

☐ CCRA designation (3 points)

☐ CICP designation (5 points)

Section I Subtotal

Section II Work Experience and Special Interests

points

A. Work Experience (2 points for each year of experience/40 points max)

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:

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points

**B. Service as a Mentor** (5 points for each mentee/5 points for each mentee-earned certification/30 points max)

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 CBA, CCRA, CBF or CCE designation, you may claim 5 points for each certification your mentee earned.

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

points

**C. Instructor** (5 points for each course/15 points max)

If you have taught (full or part-time) at a degree-granting institution or if you teach CAP or ACAP courses, 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	Year

points

**D. Panelist or Speaker** (1 point for each speaking session/15 points max)

If you have been a panelist or speaker at a live event or webinar, you may award yourself one point for every speaking session. 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	Location	Date

points

**E. Articles Published or Published Interviews Quoting You**  
(5 points for each article/2 points for each interview/20 points max)

The article must be published and pertain to credit, finance or business, and must be at least 250 words. 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. If you were interviewed for an article, please provide documentation.

Publication Name	Title of Article	Date

\_\_\_\_\_

points

**F. Career or Professional Accomplishments** (5 points max)

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.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

points

**G. Volunteer and Community Service** (1 point per year/5 points max)

List any religious, civic, fraternal or charity work you have performed. Please provide details below.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Section II Subtotal \_\_\_\_\_

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.

\_\_\_\_\_

points

**A. Volunteer National and Local Executive Service** (60 points max)

Service on an NACM Affiliate of National Board of Directors, a Committee, a Work Group, nationally sponsored Thought Leadership Groups or Task Force. Only list services within the past five years. (5 points per year of service)

Sponsor	Board/Committee/Group Name	Position	Term Served	Points
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

points

**B. Attendance at Nationally, Regionally or Locally Sponsored Educational Events** (75 points 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

points

**C. Participation in Webinars, Webcast Plus and Thought Leadership Group** (1 point each/15 points max)

List the sponsored webinars, Webcast Plus, and nationally sponsored Thought Leadership Group 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

points

**D. Industry Credit Groups**

Points are awarded for your participation in industry credit groups. Must be within the past 5 years. If necessary, list additional entries on a separate sheet and attach to this form.

- Participation in Industry Credit Groups (3 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)

points

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

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

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\_\_\_\_\_ points **F. Contributions to *Business Credit Magazine*** (2 point per article)  
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
_____	_____
_____	_____
_____	_____

\_\_\_\_\_ points **G. Participation in National Surveys** (.1 point per each survey instance/10 points max)  
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
_____	_____
_____	_____
_____	_____

\_\_\_\_\_ points **H. Corporate Accounts Receivable Data Sharing/Contribution** (2 points per year/10 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. Two participation points per year for full file contribution.

Name of NACM Affiliate Receiving Your Data Contribution	Dates of Contribution
_____	_____
_____	_____
_____	_____
_____	_____

Section III Subtotal \_\_\_\_\_

Roadmap Summary

Total Section I Points \_\_\_\_\_  
Total Section II Points \_\_\_\_\_  
Total Section III Points \_\_\_\_\_  
Total Roadmap 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 of Applicant

\_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
Date (MM/DD/YYYY)

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## Supplemental Information

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