

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 four 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 and Day (MM/DD)

Check the designation for which you are applying:

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

Section I – Education

A. Higher Education (1 point per 3 credit hours / 40 points maximum)

40 Points 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
State University	BS/Accounting		

B. Graduate Courses (2 points per 3 credit hours / 30 points maximum)

 Points Record graduate courses. If no degree was earned, state the course title and semester credit hours. Official grade transcripts must be sent by the college or university to the NACM-National Education Department to document these points.

Institution	Degree/Major	Credit(s)	Date

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F. NACM Self-Study Courses (1 point per course/5 points maximum)

2 Points NACM self-study courses are presented online, through the Credit Learning Center or formally on CD-Rom.

Course Name	Sponsor/Location	Grade	Date
Business Law	NACM National Online	A	2010
Credit Law	NACM National Online	B	2011

G. Self-Study Courses (1 point per course/15 points maximum)

 Points Self-study courses are taken at your own pace outside of school and are sponsored by 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

H. Continuing Education at Conferences, Seminars and Meetings (1 hour = 0.1 point / 25 points maximum)

.45 Points This includes continuing education received at locally, regionally or nationally sponsored educational gatherings. 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	CEUs
Tri-State Western Region Conference	Inst of Acct	Anytown	2009	.15
Tri-State Western Region Conference	Inst of Acct	Anytown	2010	.15
Tri-State Western Region Conference	Inst of Acct	Anytown	2011	.15

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I. Employer-Sponsored Training and Educational Programs (1 hour = 0.1 point / 15 points maximum)

6 Points List your attendance at educational programs sponsored by your employer. Please attach a description of the program and evidence of your attendance. (A letter from your employer describing the training and the hours is sufficient documentation.)

Event Sponsor	Event Name	Location	Date	Hours of Program/CEUs
Company name	Antitrust			2
Company name	Compliance			2
Company name	Conflict of Interest			2

J. Achievement of the CBA Designation (5 points)

_____ Points List date earned: _____

K. Achievement of the CBF Designation (5 points)

_____ Points List date earned: _____

L. Achievement of the CCRA Designation (3 points)

No additional points will be awarded to those who achieved the CBF designation prior to 2013.

_____ Points List date earned: _____

M. Achievement of the CICP Designation (5 points)

5 Points List date earned: January, 20XX

49.05 Section I Subtotal

Section II – Work Experience and Special Interests

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

40 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	Position/Title	Dates
		Director of Finance & Credit Op.	2005-Present
		Credit Manager	1999-2005
		Credit Manager	1982-1999

Total number of years experience in credit management: 30

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B. Service as a Mentor (5 points for each mentee / 10 points maximum)

10 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.

Mentee's Name	Mentee's Company	Mentee's Telephone Number
Jim Johnson		
Jane Smith		

C. Mentee Achievement (5 points for each award / 20 points maximum)

_____ Points If the individual you have listed as a mentee achieves either the CBA, CBF or CCE designation, you may claim points.

Mentee's Name	Mentee's Company	Mentee's Certification Date

D. Instructor at a Degree-Granting Institution (5 points for each course / 15 points maximum)

_____ Points 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 list it 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

E. Instructor for a Non-Degree Program (2 points for each course / 10 points maximum)

_____ Points 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 list it 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

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F. Panelist or Speaker (1 point for each 2 hours of speaking / 15 points maximum)

____ 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

G. Articles Published (5 points for each article / 20 points maximum)

____ 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, Business Credit magazine, PD News or the CRF Journal. Unpublished papers and manuscripts do not qualify. Attach a copy of the article(s) to this form.

Publication Name	Title of Article	Date

H. Special Consideration (5 points maximum)

5 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.

The controller and I created a new company –wide credit policy in 20xx. Attached is the policy. I review the policy on an annual basis and make any Necessary changes.

I. Volunteer and Community Service (1 point per year / 5 points maximum)

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

1992-1998 Voluntary Income Tax Assistance program via institute of Management Accountants

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Section III – Local and Regional Participation

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

A. Volunteer Local Executive Service (30 points maximum)

5 Points Volunteer executive service includes your service to a committee, task force or board of directors. Committee service includes program committees and locally sponsored committees. List service within the past 5 years.

- Service on a local Committee or Work Group (2 points for each term, 20 points maximum)
- Service as a local Committee or Work Group Chair (3 points for each term, 21 points maximum)
- Service on a local Board of Directors (4 points for each term, 12 points maximum)
- Service as an Officer of a Board (5 points for each term, 10 points maximum)
- Services as a local Chairman or CEO of a Board (5 points for each term, 10 points maximum)

Sponsor	Board/Committee/Group Name	Position	Term Served	Points
CFDD Chapter	Membership Committee	Chair	5/10/09-05/10/10	3
CFDD Chapter	Membership Committee	Member	5/10/08-05/10/09	2

B. Participation in Locally Sponsored Events (2 points each / 20 points maximum)

2 Points Participation points are awarded for your attendance at NACM locally sponsored educational offerings. List only those attended within the past 5 years. If necessary, type additional entries on a separate sheet of paper and attach.

Sponsor	Event Name	Location	Date
Affiliate	Affiliate Annual Meeting	Anytown	2010

C. Participation in Audio Teleconferences or Web Seminars (0.5 point each / 5 points maximum)

 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. Participation in Industry Credit Groups (1 point per year / 15 points maximum)

4 Points Participation points are awarded for your attendance at local, regional or national industry credit group meetings. List meetings attended within the past 5 years. If necessary, type additional entries on a separate sheet of paper and attach it to this form.

Building Material Group-2009, 2010, 2011
Hardwoods Group-2009

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E. Industry Credit Group Leadership

9 Points Participation points are awarded for your service to local, regional or national industry credit group committees. List service within the past 5 years.

- Service as a local, regional or national credit group member (2 points for each term, 10 points maximum)
- Service as a local, regional or national credit group chair (3 points for each term, 9 points maximum)

Group Name	NACM Affiliate Sponsor	Position/Term
Industry Credit Group	Local affiliate	Chair/2007-2008
Committee	Local affiliate	Committee member/2006-2008

F. Participation in Regionally Sponsored Events (3 points for each / 15 points maximum)

9 Points Participation points are awarded for your attendance at regionally sponsored conferences. List only those attended within the past 5 years. Use the Supplemental Information section on the last page if more space is needed.

Sponsor	Event Name	Location	Date/Year
Inst of Acct	Tri-State Western Region Conference	Anytown	2009
Inst of Acct	Tri-State Western Region Conference	Anytown	2010
Inst of Acct	Tri-State Western Region Conference	Anytown	2011

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

_____ Points List any 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 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

H. Completion of an NACM CAP Program (10 points)

_____ Points

I. Completion of an NACM ACAP Program (15 points)

_____ Points

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Section IV – National Participation

National participation points are awarded for your service at the national level. Your service at the national level to NACM, CFDD, FCIB and CRF should be recorded in this section.

A. Volunteer National Executive Service (30 points maximum)

_____ Points Volunteer executive service includes your service to a national committee, task force or board of directors. List service within the past 5 years.

- Service as a National Committee or Work Group Member (3 points for each term, 15 points maximum)
- Service as a National Committee or Work Group Chair (4 points for each term, 20 points maximum)
- Service as a Member of a National Task Force (4 points for each term, 20 points maximum)
- Service as a National Task Force Chair (5 points for each term, 20 points maximum)
- Service as a Member of a National Board of Directors (5 points for each term, 30 points maximum)
- Service as a Director of a National Board of Directors (6 points for each term, 24 points maximum)
- Service as an Officer of a National Board of Directors (7 points for each term, 28 points maximum)
- Service as the Chair of a National Board of Directors (10 points for each term, 30 points maximum)

Sponsor	Committee/Task Force/Board	Position	Term Served	Points

B. Attendance at Nationally Sponsored Educational Events (5 points each / 40 points maximum)

_____ Points For each nationally sponsored program you have attended within the past 5 years, you may claim 5 points. This includes, but is not limited to, the NACM annual Convention, the annual Legislative Conference, the FCIB Global Conference, FCIB European Conferences, GBG Seminars, Asset Protection Group Conferences and CRF Open Regional Meetings.

Sponsor	Event Name	Location	Date

C. Participation in Audio Teleconferences or Web Seminars (1 point each / 10 points maximum)

_____ Points List nationally 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. Honors, Awards and Achievements (1 point per award)

_____ Points List any national honors or 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 (i.e., National Credit Executive of the Year).

Award Sponsor	Name of Award	Date Received

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E. Participation in National Surveys (.1 point per each survey instance / 10 points maximum)

2.1 Points List any nationally sponsored surveys in which you participated in the last five years (e.g., Credit Manager's Index, Business Credit Compensation Study, NACM Monthly Survey, etc).

Survey Name	Number of Instances
NACM	20
Business Credit Compensation	1

F. Corporate Accounts Receivable Data Sharing/Contribution (1 point per year / 5 points maximum)

_____ Points 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

2.1 Section IV Subtotal

Section V – Roadmap Summary

Section I – Education: 49.05

Section II – Work Experience and Special Interest: 60

Section III – Local and Regional Participation: 29

Section IV – National Participation: 2.1

TOTAL ROADMAP POINTS: 140.15

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 _____

Supplemental Information
