

NACM Career Roadmap

C. NACM Formal Programs (60 points maximum)

10 Points • NACM In-House Certificate Sessions
(10 points each)
• Legal Workshops (3.5 points each)

• Graduate School of Credit & Financial
Management (GSCFM®)
(30 points for completing the full program
10 points per year attended if you did not
complete the program)

Program	Location	Year Completed
Business Credit Principles	Columbia, MD	2008

D. Credit Administration Program (CAP) (1 point per course/ 4 points maximum)

1 Points The CAP is a college-level course program designed to prepare those working in the field of credit and financial management for greater responsibility. If your CAP courses are part of your college degree, you may take credit for them in only one section, either A or D. You may not list the same course twice.

Course Name	Sponsor/Location	Grade	Date
Financial Statement Analysis I	Local affiliate	A	2007

E. Advanced Credit Administration Program (ACAP) (1 point per course/ 6 points maximum)

2 Points The ACAP is a college-level course program designed for those who have completed CAP or for those at a more experienced level. If your ACAP courses are part of your college degree, you may take credit for them in only one section, either A or D. You may not list the same course twice.

Course Name	Sponsor/Location	Grade	Date
Business Law	Local affiliate	B	2009
Credit Law	Local affiliate	B	2009

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

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

Course Name	Sponsor/Location	Grade	Date

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)

3 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
NACM Credit Congress	NACM	Orlando, FL	2009	1
Bankruptcy	NACM Affiliate	Austin, TX	2/22/08	.5
Western Region Conference	NACM Affiliate	Las Vegas, NV	10/08	1
NACM Gateway	NACM Affiliate	St. Louis, MO	09/07	.5

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

3.6 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	Making Effective Collection Calls	Web	04/09	1
Company	Credit Administration	Chicago, IL	01/08	16
Company	Dispute Management	Chicago, IL	01/08	8
Company	Microsoft Outlook	Web	01/09	8
Company	GSA Compliance	Web	02/11	2
Company	Government Ethics	Web	07/10	1

J. Achievement of the CBA Designation (5 points)

5 Points List date earned: 2008

K. Achievement of the CBF Designation (5 points)

5 Points List date earned: 2009

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 CACP Designation (5 points)

_____ Points List date earned: _____

35.6 Section I Subtotal

Section II – Work Experience and Special Interests

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

24 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
		Credit Analyst II	2007-present
		Sr. Credit Analyst	2001-2007
		Credit Analyst	2000-2001
		Credit Administrator	1998-2000

Total number of years experience in credit management: 12

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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
Susan Smith		
George Jones		

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

10 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
Susan Smith		2010
George Jones		2010

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 points 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.

Developed new deduction procedure for company identifying and coding deductions to track resolutions of outstanding A/R balances. A/R Factoring Procedure, Training Plan for new employees.

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.

Volunteer at Golf Tournament to raise money for local hospice-2 years

Junior Achievement-Served as a mentor to junior high school students for 2 years. Served on the Education Committee for one year. Recognized as outstanding mentor in 2009.

54 Section II Subtotal

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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)

- _____ 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

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

- _____ 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

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)

- 5 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.

NACM Affiliate-Metals: Fall 2006-Philadelphia, PA: Spring 2007- Louisville, KY: Fall 2008- Rolling Meadows, IL, Fall 2009- St. Louis, MO

NACM Affiliate- Metal Building Components: Winter, 2007-San Antonio, TX: Winter, 2008-Austin, TX: Winter 2010- San Antonio, TX: Fall 2010- New Orleans, LA

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E. Industry Credit Group Leadership

13 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
Metals	NACM Affiliate	2010 Vice Chair
Metals	NACM Affiliate	2011 Chair
Metals	NACM Affiliate	Member 2006-Present

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
NACM Affiliate	Regional Credit Conference	City, State	2008
NACM Affiliate	NACM Gateway	City, State	2007
NACM Affiliate	Bankruptcy	City, State	2008

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)

15 Points

42 Section III Subtotal

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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)

 5 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
NACM National	Credit Congress	Orlando	2009

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

 3 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
NACM	Taking the Fear out of Financial Statements	Toni Drake, Esq.	2009
NACM	Bankruptcy: Point/Counterpoint	Bruce Nathan, Esq./Wanda Borges, Esq.	2010
NACM	Escheatment	Val Jundt	2011

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

 1 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
Company	Employee of the Month	2009

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

3 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
Credit Manager's Index	3

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

12 Section IV Subtotal

Section V – Roadmap Summary

Section I – Education: 35.6

Section II – Work Experience and Special Interest: 54

Section III – Local and Regional Participation: 42

Section IV – National Participation: 12

TOTAL ROADMAP POINTS: 143.6

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
