

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:

- CBFSM 75 Documented Roadmap Points, having earned the CBASM and completed the two course requirements
- CCE[®]
 - 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[®] (GSCFM[®]) (5 points)

| 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'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 |
|-------------|------------------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

D. NACM Credit Learning Center and 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, nationally sponsored Thought Leaders Forums participation and Webcast Plus (0.1 point per 1 hour/40 points max)

_____ points

This includes continuing education at in-person sessions, Webcast Plus webinars and nationally sponsored Thought Leaders Forums. 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 |
|------------|---------------|--------------------------|-------|-------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

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_____ 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 |
|---|-------------|
| <input type="checkbox"/> CBA designation (8 points) | _____ |
| <input type="checkbox"/> CBF designation (5 points) | _____ |
| <input type="checkbox"/> CCRA designation (3 points) | _____ |
| <input type="checkbox"/> 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 |
|------------------|------------------|-------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

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F. Career or Professional Accomplishments (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.

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.

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.

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

_____ points

Service on an NACM Affiliate of National Board of Directors, a Committee, a Work Group, nationally sponsored Thought Leaders Forums 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 |
|----------------|-----------------------------------|-----------------|--------------------|---------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

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

_____ points

List events attended within the past five 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 Webinars, Webcast Plus and Thought Leadership Group (1 point each/15 points max)

_____ points

List the sponsored webinars, Webcast Plus, and nationally sponsored Thought Leaders Forums 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 |
|---------|------------|--------------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

D. Industry Credit Groups

_____ points

Points are awarded for your participation in industry credit groups. Must be within the past five 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)

| | | | |
|-------|-------|-------|-------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

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 |
|---------------|---------------|---------------|
| _____ | _____ | _____ |
| _____ | _____ | _____ |
| _____ | _____ | _____ |

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F. Contributions to *Business Credit Magazine* (2 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 (2 points per year/10 points max)

_____ 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. 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)

