

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 three course requirements
- x 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)

10 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
PCC	BUSINESS	30	2001 - 2005

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

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
Financial Statements: Interpretation & Credit Risk	Columbia, MD	2010

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

_____ 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.

No longer offered locally

Course Name	Sponsor/Location	Grade	Date

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

_____ 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.

No longer offered locally

Course Name	Sponsor/Location	Grade	Date

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

.6 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 Writing Skills	Credit Learning Center	Pass	06/2005
Communication & Credit	Credit Learning Center	Pass	07/2006
Negotiable Instruments	Credit Learning Center	Pass	04/2007
Business Credit Fraud	Credit Learning Center	Pass	03/2008
Uniform Commercial Code	Credit Learning Center	Pass	08/2009
Legal Forms of Business	Credit Learning Center	Pass	01/2010

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

4.8 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
Advanced Credit & Financial Analysis	Dunn & Bradstreet	4.8	Pass	2004

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

12.10 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
CFDD Educational Meetings	CFDD	Portland Chapter	2003-2008	6.15
PNWCC	CFDD	Vancouver Chapter	2006	.6
CREDIT CONGRESS	NACM	Las Vegas	2007	1.35
PNWCC	CFDD	Tacoma Chapter	2007	1.25
CREDIT CONGRESS	NACM	Louisville	2008	1.30
Advanced Collection & Negotiation	NACM-Oregon	Portland	2005	.60
Time Management	NACM-Oregon	Portland	2007	.35
Legal Challenges	NACM-Oregon	Portland	2008	.35
ECOIA	NACM-Oregon	Portland	2008	.15

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

2.5 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	Dispute Management	Portland, OR	2008	.8
Company	Microsoft Outlook	Portland, OR	2009	.8
Company	GSA Compliance	Portland, OR	2009	.8
Company	Government Ethics	Portland, OR	2010	.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 CACP Designation (5 points)

____ Points

List date earned: ____

50 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
ABC Environmental	Portland, OR	Credit Manager	1980-1998
XYZ Petroleum Equipment Company	Portland, OR	Corporate Credit Manager	2002-2011

Total number of years experience in credit management: 26

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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	INTEL-ONE	503-111-1234
George Jones	MY NIKE	503-999-5678

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

5 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	INTEL-ONE	March 2011

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)

1.5 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
NACM-Oregon	Certification Roadmap	1 hour	Portland, OR	09/2007
NACM-Oregon	Certification Roadmap	1 hour	Portland, OR	02/2008
NACM-Oregon	Certification Roadmap	1 hour	Portland, OR	08/2008

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.

As Corporate Credit Manager, I created a proprietary credit scoring model that includes a customer's credit history with us, banking information, trade Information and Financial Statement information. Credit Scoring is based not only on referenced information but also based on a comparison against peer groups within the customer's industry. Liquidity, leverage and profitability analysis is built into the model.

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.

Junior Achievement 2003 – 2005. 2003 served as a mentor to junior high and elementary students & 2005 served on JA Education Committee.
Gingerbread House – Children's Advocacy Center 2005 – present. Non-profit organization provides forensic interviews & counseling services to child victims of abuse. I've organized drives for families and children in need at Christmas and assisted with GH annual fund raiser for 5 years.
1992-1993 Voluntary Income Tax Assistance Program via Institute of Management Accountants

66.5 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)

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	Membership Committee	member	05/08 – 05/09	2
CFDD	Membership Committee	chair	05/09 – 05/10	3

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

20 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
CFDD	CFDD Meetings – list attached	Portland, OR	2006 - 2011

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.

NACM-Oregon webinars

Sponsor	Event Name	Speaker Name	Date
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D. Participation in Industry Credit Groups (1 point per year / 15 points maximum)

_____ 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.

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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
Petroleum Industry Trade Group	NACM-Oregon	Committee member 2006 - 2008
Petroleum Industry Trade Group	NACM-Oregon	Chair 2007-2008

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
NACM-Canada & CFDD	Pacific Northwest Credit Conference	Vancouver, Canada	09/2006
NACM- Washington & CFDD	Pacific Northwest Credit Conference	Tacoma, WA	09/2007
NACM-Oregon & CFDD	Pacific Northwest Credit Conference	Portland, OR	09/2010

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

3 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
NACM-Oregon	2007 Credit Business Fellow Of The Year	04/2007
CFDD-Portland	2008 Distinguished Member Award	09/2008
XYZ Petroleum	2009 Employee of the Month	10/2009

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

_____ Points

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

_____ Points

46 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)

6 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
CFDD	Program Award Selection	Committee Member	2007-2008	3
CFDD	Program Award Selection	Committee Member	2009-2010	3

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

20 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	Credit Congress	Las Vegas, NV	06/2007
NACM	Credit Congress	Louisville, KY	05/2008
NACM	Credit Congress	Orlando, FL	06/2009
NACM	Credit Congress	Las Vegas, NV	06/2010

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)

0 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)

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

32 Section IV Subtotal

Section V – Roadmap Summary

Section I – Education: 50

Section II – Work Experience and Special Interest: 66.5

Section III – Local and Regional Participation: 46

Section IV – National Participation: 32

TOTAL ROADMAP POINTS: 194.5

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
