

*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.

Name: Mr./Ms. \_\_\_\_\_

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
- 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)**

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/Course(s)	Credit(s)	Date

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

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/Course(s)	Credit(s)	Date

**C. NACM Formal Programs (60 points maximum)**

- Credit Management Leadership Institute (CMLI)
- Mid-Career School (MCS)
- Advanced Credit Executive Studies (ACES) (10 points each for the above programs)
- Advanced Issues in Financial Analysis Program (7 points)
- 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

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

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 courses twice.

Course Name	Sponsor/Location	Grade	Date

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

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, A or E. You may not list the same courses twice.

Course Name	Sponsor/Location	Grade	Date

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

NACM self-study courses are presented online or on CD-ROM.

Course Name	Sponsor/Location	Grade	Date

**G. Self-Study Courses (15 points maximum)**

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)

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 page 26 if more space is needed.

Event Name	Event Sponsor	Location	Date	CEU

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

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/CEU

**J. Achievement of the CBA designation (5 points)**  
List date earned: \_\_\_\_\_

**K. Achievement of the CBF designation (5 points)**  
List date earned: \_\_\_\_\_

**Section I Subtotal**

**Section II - Work Experience and Special Interest**

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

Total number of years experience in credit management: \_\_\_\_\_

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

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

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

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)**

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)**

If you have taught a course pertaining to credit, finance or business (as part of a non-degree program) list it here. This includes teaching in-house, employer-sponsored courses. Please attach copies of the course brochure listing you as an instructor or have the course sponsor verify your service by letter. Courses must be at least one hour in duration to qualify.

Course Name	Sponsor	Location	Total Hours	Date

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

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)**

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)**

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.

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

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

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**Section II Subtotal**

### Section III - Local and Regional Participation

Participation points include local NACM Affiliated Association 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)

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 five years.

- Service on a local Committee *(2 points for each term / 20 points maximum)*
- Service as a local Committee 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)

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

Sponsor	Event Name	Location	Date

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

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 each / 15 points maximum)

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


**E. Industry Credit Group Leadership**

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

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

Group Name	NACM Affiliate Sponsor	Position/Term

**F. Participation in Regionally Sponsored Events**

*(3 points for each / 15 points maximum)*

Participation points are awarded for your attendance at regionally sponsored conferences. List only those attended within the past five years. If necessary, continue your listings in the Supplemental Information section on page 26.

Sponsor	Event Name	Location	Date/Year

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

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)**

**I. Completion of an NACM ACAP program (15 points)**

**Section III Subtotal**

## 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)

Volunteer executive service includes your service to a national committee, task force or Board of Directors. List service within the past five years.

- Service as a National Committee Member *(3 points for each term / 15 points maximum)*
- Service as a National Committee 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(s) Served	Points

### B. Attendance at Nationally-Sponsored Educational Programs (5 points each event / 40 points maximum)

For each nationally-sponsored program you have attended within the past five years, you may claim five 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 point maximum)

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)

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

### Section IV Subtotal

