Designation Chart

A Step-by-Step guide to Designations

Step 1

Register with NACM National Education Department

Complete the Education Registration Form and submit the associated fee to NACM National to create your lifetime education account.

Requirements:
- Registration Fee
- Account Application

Step 2

Optional: Submit Roadmap for CBF & CCE

If applying for CBF or CCE Designations, submit a finished roadmap.

Requirements:
- Roadmap

Step 3

Choose a Designation Path and Register for Classes

- Register for classes through NACM Connect
- Submit Transcripts to NACM National to opt-out of designated classes.

Recommended Path:

CBA – CCRA – CBF - CCE

CBA

Certified Business Associate

Requirements:

Business Credit Principles
Basic Financial Accounting*
Financial Statement Analysis 1*

CBF

Credit Business Fellow

Requirements:

CBA Designation
75 Roadmap Points
Business Law
Credit Law

CCRA

Certified Credit and Risk Analyst

Requirements:

Basic Financial Accounting*
Financial Statement Analysis 1*
Financial Statement Analysis 2

Class may be Opted-Out of with relevant college coursework

CCE

Certified Credit Executive

Recertification Required:
- Every 3 Years
- 3 Education Points
- 3 Participation Points

Plan A Requirements:
4-Year College Degree
10 Years of Experience
125 Roadmap Points

Plan B Requirements:
CBA Designation
CBF Designation
125 Roadmap Points

Plan C Requirements:
57 Years or Older
15 Years of Experience
125 Roadmap Points

Step 4

Submit Designation Application

After all courses have been completed, submit your application for the desired designation to NACM National.

Step 5

Register and Attend Review Class

Register for a CBA, CBF or CCE review class to prepare and answer any questions regarding the designation exam.

Step 6

Complete and Pass the Designation Exam

Complete and pass your exam to receive your Designation and a Certificate displaying your accomplishment.

Resources:

Applications, Forms, Roadmaps, etc.

Course and Review Class Registration

Submit Account Registration, Transcripts, Designation Application, etc.

Questions, Concerns, etc.?