



American Society
Credit and Collection Professionals
www.creditsociety.org



CREREDENTIALS BUILD SUCCESS & CAREERS TWO ROUTES TO CERTIFICATION:

PLAN A – EXPERIENCE BASED METHOD TO BECOME CERTIFIED

- ⇒ DO YOU HAVE **5+ YEARS OF BUSINESS CREDIT** OR BUSINESS COLLECTION EXPERIENCE OR BOTH, **or**
- ⇒ DO YOU HAVE ANOTHER AWARD OR DESIGNATION AND **3+ YEARS OF PRACTICE** IN CREDIT AND / OR COLLECTIONS?
- 1. If so, APPLY TODAY for evaluation as a **Broadly Experienced Credit & Collection Professional (BECCP)**.
- 2. Apply for:
 - a. Certified Credit Professional (CCP) or
 - b. Certified Professional Collector (CPC) or both.

PLAN B – INTERN DEVELOPMENT PROGRAM METHOD OF BECOMING CERTIFIED

- ⇒ HAVE YOU WORKED IN CREDIT & COLLECTIONS LESS THAN 5 YEARS, **and**
- ⇒ HAVE ASPIRATIONS OF BECOMING CERTIFIED IN THE NEAR FUTURE?
- 1. If so, ESTABLISH A COUNCIL RECORD TODAY.
- 2. Begin documenting your professional experience.
- 3. Your previous experience and education will count toward satisfying the Credentialing Standard Board's (CSB) requirements for Certification as:
 - a. Certified Credit Professional (CCP) or
 - b. Certified Professional Collector (CPC) or both.

NOTE: In 2019, a training program was developed to put interns on the fast track. Upon completion of the program and passing an examination, candidates will be required to have one year of experience in collections or credit management or both to become eligible for the CCP and/or CPC. Contact NACS with any questions.

Visit www.creditsociety.org for more information or call NACS. Open the door to success through CREDENTIALING and build upon your success and career through the American Society of Credit & Collection Professionals, the CCP & CPC!

**ASCCP's National Accreditation Program is administered locally by:
NACS Credit Services Inc
PO Box 12370
Overland Park KS 66282
800.525.7228 – <http://www.nacskc.com>**

CERTIFICATION

- Certification
- Certification Overview
- Introduction to Certification
- Standards of Eligibility
- Revocation of Certification
- U.S. Requirements
- BECCP Certification

Broadly Experienced Credit & Collection Professional™ (BECCP PLAN)

BECCP CERTIFICATION PROCESS

You are considered a "broadly experienced credit or collection professional" if you have a minimum of five (5) years experience in business credit or business collections. BECCP candidates for the CCP or CPC, if meeting criteria as defined below reduces the number of years of experience required in order to qualify for the Broadly Experienced Credit & Collection Professional plan. The required number of years of practice as a credit and or collection professional is determined as follows:

- If you hold any associate, baccalaureate or higher degree, you must demonstrate a minimum (3) three years of practice in either or each business credit, business collections, or both;
- If you hold a CBA, CBF, CCE, CCM, CNA, CPA, CRM or other Accounting, Credit, Treasury award or designation, you must demonstrate a minimum (3) three years of practice in either or each business credit, business collections, or both;
- If you hold no degree, no designations or designation awards, you must demonstrate a minimum (5) five years of practice in either or each business credit, business collections, or both.



HOW TO APPLY

FORMS

- Certification Application
- Employment Verification Form

Complete an Application for Council Record/Certificate. Indicate on the application the application is being submitted for evaluation as a **Broadly Experienced Credit & Collection Professional (BECCP)**. Indicate the accreditation applied for; CCP, CPC or both.

Once your eligibility for BECCP has been determined, three members of CSB will review your dossier, and make written reports to the CSB board. The CSB will reach a consensus at its next scheduled meeting as to whether or not you have demonstrated the required learning, broad-based knowledge and experience necessary. If you have done so, the CSB will either approve your application as submitted for accreditation or invite you for a personal interview to be held at a CSB subsequent meeting.

If your dossier does not demonstrate the required learning, broad-based knowledge and work experience required under the BECCP plan, you may within one (1) year, request a second review of your application after acquiring additional knowledge or experience as recommended by the CSB review board or the local jurisdictions initial evaluation.

If the CSB review committee recommends a personal interview, such an interview is conducted by (3) three CSB members and is intended to verify the material and expertise presented in your dossier. If your interview is successful, you will receive Certification, assuming all other requirements have been met. An interview if required is included in the cost of the filing fee. CSB charges **an additional fee** of \$100 if a second review of your application for accreditation occurs within one (1) year of your original application evaluation.

The CSB meets at a minimum, (3) three times per year at approximately four-month intervals.

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NACS Credit Services Inc
PO Box 12370
Overland Park KS 66282
800.525.7228 - <http://nacskc.com>



American Society

ASCCP

Credit & Collection Professionals

About the courses:

Each course is approximately one (1) hour in length. Courses can be taken individually, and used for professional training or the series of courses can be taken to fulfill certification requirements for either the Certified Credit Professional (CCP) or the Certified Professional Collector (CPC) accreditation. To meet eligibility requirements for accreditation, students must complete all courses in each module. In addition, certain core competencies are required for both the CPC and the CCP accreditations. Dropbox is required to receive the recordings. A link to a free download will be sent along with your confirmation.

Fees:

Students will indicate on the registration form their choice of courses or if they wish to take the complete series. Please note: A sizable discount in fees is offered for participation in the entire series of programs.

Completion of the Course or Program:

For those enrolled in the entire series to fulfill the CPC and/or CCP Certification requirements an extensive examination will be administered following completion of the coursework. Successfully passing the exam(s) at the conclusion of the courses is required to qualify for the CCP and/or CPC eligibility requirements. An Application for Council Record should be submitted to the CSB Board prior to enrolling in the series if you are taking all the courses to pursue the CPC and/or CCP accreditations.

Successful completion of one or both modules with a minimum of one (1) year each working in the business credit or business collection field, allows the applicant to request the CSB Board review their application under the training series plan.

Participation Tracking: A Certificate of Completion will be awarded to students completing one or both CCP | CPC Modules and passing the exams. For those individuals seeking to meet course requirements for accreditation, a transcript will accompany your Completion Certificate that you will send with your Application For Council Record to apply for your Certification(s) to the American Society of Credit & Collection Professionals. All registered attendees, regardless of the number of courses taken, will receive a Student Record Participation Form.

COMPREHENSIVE CREDIT PROFESSIONAL'S TRAINING SERIES

Online – On Time – Concise – Thorough In Depth – Relevant

In collaboration with the American Society of Credit & Collection Professionals, this series of courses was developed to provide comprehensive training for individuals in credit and collection in order to prepare them for their role in this ever-changing field.

Training for the **Certified Professional Collector & the Certified Credit Professional**

You may apply for the Certified Professional Collector (CPC) and Certified Credit Professional (CCP) after 5 years on-the-job experience. However, by successfully completing the CPC and CCP Modules and passing all the exams, you will be eligible to apply for the Certification(s). If you are approved by the CSB Board and work one year in business credit and/or collection you, will be recognized as a Certified Credit Professional and/or a Certified Professional Collector.

This series will help those who aspire to become Certified and also those who wish to use these courses to learn techniques that will improve their job skills immediately!

CERTIFICATION

Why should business credit and collection professionals apply for Credentialing Standards Board (CSB) accreditation as soon as the opportunity is available? The answer is this. By having accreditation in place, Certificate holders are more valuable to their employers. Why? Because they have invested in their own professional development in order to strengthen specific skills needed on the job. Individuals with professional credentials are also more respected by their colleagues and peers in the industry.

CERTIFICATION ELIGIBILITY REQUIREMENTS

In summary, there are three (3) paths to CCP & CPC Certification:

- 1) A Broadly Experienced Credit & Collection Professional (BECCP) applicant must have a minimum of five (5) years credit & collection management experience.
- 2) The Intern Development Program permits applicants with less than (five) 5 years of experience to apply for Certification after acquiring 700 on-the-job training units from a variety of core competency areas.
- 3) Complete this Comprehensive Training Series, successfully pass the exam(s) associated with each module (CCP and/or CPC), in addition to one year of directly related, on-the-job experience for each credential.

If you already hold one Certification, either the CPC or CCP, you may complete the alternate course module to reach eligibility requirements sooner.

These modules may be used for RECERTIFICATION purposes if you presently hold the CPC and/or CCP Certificates.

The knowledge gained in these courses will not only speed up the certification eligibility process, but will also enhance the necessary skills you need on the job today!

REGISTRATION:

For those taking courses individually:

I have checked the individual course(s) I will participate in. I understand that BCMA will track my participation and Continuing Professional Education Units: (1.0 CPE's) and (.1 CEU's) Continuing Education Units will be awarded for each course completed.

For those taking every course in each module in fulfillment of core competency requirements for the Certified Professional Collector (CPC) and/or the Certified Credit Professional (CCP):

I am registering for all courses for the CPC Module

I am registering for all courses for the CCP Module

In order for these courses to meet eligibility requirements for the CPC and CCP, individuals must successfully pass an exam for each module. Upon successful completion of all courses and exams, students will receive a Certificate of Completion for each or both CPC and CCP. In addition to successfully completing the Module(s) and exams, students will also be required to officially apply for the Certification(s) by completing the Application for Council Record and submitting that form to the American Society of Credit & Collection Professionals along with associated fees. To meet eligibilities requirements for both Certifications, one year of on-the-job training is also required. NOTE: Not interested in Certification? You may want to take all the courses in these modules at the lower cost and use the training for educational purposes without having to apply for Accreditation.

COURSES may be taken individually, or sign up for one or both modules

Courses may be taken individually or sign up for the entire Module
(13 sessions one-hour each) to meet **CPC** Core Competency Requirements

- 1) Become a more successful collector
- 2) Managing stress in the workplace
- 3) Negotiation techniques and the collection call
- 4) Effectively addressing broken payment commitments
- 5) When and how to hold orders
- 6) Deduction resolution
- 7) Establishing credit limits
- 8) Bankruptcy essentials
- 9) Account analysis tools
- 10) Business entities and legal structure
- 11) Basic credit risk management
- 12) Foreign Debt Collection
- 13) Credit law

Courses may be taken individually or sign up for the entire Module
(19 sessions one-hour each) to meet **CCP** Core Competency Requirements

- 1) Organize the credit department for optimum performance
- 2) Using your credit application to reduce risk and accelerate collections
- 3) Formulating, implementing and monitoring a credit policy
- 4) Establishing and managing credit limits
- 5) People management
- 6) Advanced bankruptcy issues
- 7) Trade credit insurance
- 8) Effective communications
- 9) Conflict management
- 10) Laws governing credit department activities
- Financial Statement Analysis (4, one-hour sessions)
 Session 11 Session 12 Session 13 Session 14
- 15) Credit risk management
- 16) Doing business with different types of business entities
- 17) Improving interactions with sales
- 18) Advanced negotiation skills
- 19) Dispute deduction management

FEES:

- \$75 per course individually (check those you are registering for)
- \$759 for CPC module (13 courses, 13 total hours)
- \$759 for CCP module (19 courses, 19 total hours)
- \$1159 for both modules CPC and CCP (32 courses, 32 total hours)

Name _____ Company _____
Company mailing address _____
Email _____ Phone _____ Fax _____

Method of payment _____ Total Investment \$ _____
 Check if you are a NACS Member
 Check enclosed
 Credit card
(Please contact WCA at 262.827.2880 with credit card information)

RETURN TO:

The Business Credit Management Association
15755 W Rogers Dr #200 | New Berlin WI 53151

Questions: Dianna Rowinski 262.289.1225

Or register online: <https://wccredit.org/webinar-seminar-registration/>





CPC Core Competency Requirements **CERTIFIED PROFESSIONAL COLLECTOR**

CPC 1 Becoming a More Successful Collector

- The do's and don'ts of debt collection
- Ideas for accelerating cash inflows
- Handling belligerent customers and antagonistic sales people
- Prioritizing the collection process to maximize your return on investment
- Tips on becoming a proactive rather than reactive debt collector

CPC 2 Managing Stress in the Workplace

- Tips on dealing with work related stress more successfully

CPC 3 Negotiation Techniques & the Collection Call

- Understanding the perceptions, the style of negotiation, and the interests of both parties
- Who uses it? Why use it? When to use it?
- Expectations of the negotiation
- What are the non-negotiable terms and what can be modified?
- What is the minimum that an agreement can reach one?
- The negotiation strategy
- Identifying the most important interests of your customer

CPC 4 Effectively Addressing Broken Payment Commitments

- Tools & techniques that will reduce the number of broken payment promises
- Confirming payment commitments
- Confirming promised payments in writing
- The most common (and most serious) mistake a collector can make when a customer breaks a payment commitment
- Effective collection techniques *after* a payment commitment has been made and broken
- Techniques to accelerate payment after the first promise of payment is broken

CPC 5 When and How to Hold Orders

- Setting the stage: Understanding your company's tolerance for risk and payment delinquencies
- Balancing your company's needs with the role and goals of the credit function
- Conditions under which a credit hold is almost the only appropriate course of action
- Who should have the authority to place accounts or orders on credit hold
- Using credit holds to your best advantage
- Steps to take immediately after placing an order or a customer on credit hold
- Common (and most serious) mistakes made after a customer on hold has paid their past-due balance

CPC 6 Deduction Resolution

- Putting it in perspective: recognizing how much time is spent on deductions and how little deductions are as a percent of total AR
- The goals of deduction management
- Keys to successful deduction management
- Senior management's role in reducing common customer deductions
- The hidden costs of customer deductions
- Writing off deductions
- Documenting deductions and what to do with that documentation
- Reducing deduction problems

CPC 7 Establishing Credit Limits

- Considerations for new customers
- Monitoring credit limits
- Indicators for reasons to reduce limits
- Delegating credit granting authority
- Managing existing customers' credit limits

CPC 8 Bankruptcy Essentials

- Types of bankruptcies you are most likely to see
- 10 things you should always do *immediately* after being notified of a bankruptcy filing
- Priority of claims in bankruptcy
- Rights and responsibility of pre-petition credits in a debtor bankruptcy
- Risks associated with selling to a customer after a Chapter 11 bankruptcy
- Reclamation rights
- Disputing a Preferential Transfer
- Proof of Claim
- Myths and conceptions about the US Bankruptcy Code

CPC 9 Account Analysis Tools

- Credit applications
- Establishing, reviewing, and changing credit limits
- Scoring
- Use of Financial Statements
- Other factors

CPC 10 Business Entities & Legal Structure

Before you make a credit decision, you need to know about how your customer has set up their business. This will help you understand how to proceed with the credit evaluation and ultimately who is responsible for paying the invoice.

- Creditor's interest in legal composition
- The importance of the legal form of organization in credit decisions
- Major features of sole proprietorships
- Partnerships and their liability to creditors
- The various forms of Corporations
- Limited Liability Companies (LLC's)
- Joint Ventures
- Managing subsidiaries of major corporations

CPC 11 Basic Credit Risk Management

Credit risk management is the process used to identify, assess and prioritize credit risk. Once these risks are identified, the credit manager must develop a plan to minimize the impact of unfavorable events. The most significant risks include payment default, serious payment delinquency and damage to customer goodwill. In this program, we will examine ways to identify and manage risk, and to mitigate or eliminate risk. This program includes:

- Tactics for understanding and documenting your company's tolerance for credit risk
- Strategies for managing risk
- Fundamental credit activities associated with risk mitigation
- Tools for measuring the effectiveness of the credit risk management process
- Techniques for ensuring your efforts are consistent with your company's objectives
- 20 tools to better manage credit risk

CPC 12 Foreign Debt Collections

This session would begin with the materials from the 10-Minute Tip segment already done and follow up with more material to create a 1-hour program. This would be a segment that would only need to be taken one time if the student was using it for the CCP and CPC. The core competency requirements are that both certifications have this training.

CPC 13 Credit Law

Overview discussion of: The Bankruptcy Code, Automatic Stay, Credit Applications, Law Suits, Personal and Corporate Guarantees, Promissory Notes, Credit Agreements, Choice of Law, ECOA, FDCPA, Escheatment, Embargos, and Mechanics' Liens.

Core Competency Requirements - CCP

CERTIFIED CREDIT PROFESSIONAL

CCP 1 Organizing the Credit Department for Optimum Performance

- Ideas for accelerating credit review of new and active accounts
- Reducing payment delinquencies and bad debt losses
- Tips for improving DSO, cash forecasting
- Receivables monitoring and reporting
- Accelerating the decision making process relating to orders pending
- Getting other departments to be more responsive to the credit
- Setting appropriate goals for each member of the credit team
- Measuring performance and tips on addressing substandard performance
- Cross-training advantages, mentoring and motivating subordinates

CCP 2 Using Your Credit Application to Reduce Risk & Accelerate Collections

- How to create an effective online credit application (with examples)
- What terms and conditions your application should include
- Issues to consider when evaluating the enforceability of applications
- Benefits to applicants and credit companies of online credit applications
- Risks associated with creditors accepting online credit applications
- The most common problems with applications and how to avoid them
- Turning your credit application into an effective collection tool
- Ways to use the credit application more effectively to manage credit risk
- How to use your application to reduce the number of deductions taken...and resolve deductions more quickly.

CCP 3 Formulating, Implementing and Monitoring a Credit Policy

We will examine the process of formulating, implementing and monitoring policies and procedures that relate to the credit department. In general, a policy is a course of action developed for recurring situation, designed to achieve established objectives and outcomes. In business, policies may exist at several levels. Credit policies apply to the credit department's activities. Although there is no such thing as a risk-free transaction, credit policies establish a guide for consistent credit decisions directed toward attaining the goals established by the company for the credit department. Credit policies also act as a training tool for your employees. A procedure describes the actual working steps that should be followed in the appropriate order to accomplish the desired credit result or decision. We will offer many suggestions during this program that you may want to use in formulating your own credit policy and procedures manual. A sample credit policy will be included as a supplement.

CCP 4 Establishing & Managing Credit Limits

- How to establish a credit limit for a new customer
- Tools to monitor customers' credit limit
- Indicators that a credit limit should be reduced
- Reducing credit risk without reducing credit limits
- How the business structure affects your credit evaluation and decision (corporation, LLC, joint venture, sole proprietorships, etc) and managing subsidiaries of major corporations

CCP 5 People Management

- Hiring and retaining the best
- Training and coaching
- Teams and cross training
- Setting goals and acknowledging performance
- Termination

CCP 6 Advanced Bankruptcy Issues

- An overview of business bankruptcies
- What creditors must know before considering offering a bankrupt customer open account terms
- Options and alternatives to open account terms
- Myths and misconceptions about debtors' duties and responsibilities post bankruptcy
- Collateral, security and bank guarantees
- What to do when a debtor in possession does not or will not or cannot pay post-petition debts
- Your rights and claim priority if a Chapter 11 liquidates or converts to a Chapter 7 bankruptcy

CCP 7 Trade Credit Insurance

- Reasons to consider or refuse to buy credit insurance
- Advantages and disadvantages of the coverage
- What is covered, what is not
- A thorough description of coverage and policy intent

CCP 8 Effective Communications

- Interactions with customers
- Interactions with salespeople
- Interactions with co-workers
- Interactions with management, and
- Interactions with vendors and suppliers

CCP 9 Conflict Management

- Identify and reduce the harmful affects in the workplace
- Resolving conflict with customers
- Methods that work and that do not work
- Cost of conflicts
- Resolution strategies and skills

CCP 10 Laws Governing Credit Department Activities

- Learn about the laws governing the credit department's actions
- There are many rules governing collectors that interact with consumers
 - There are very few rules governing business debt collection
 - The rules covering B2B debt collection will be explored in depth in this presentation
- This basic information about bankruptcy will be examined in this presentation
- The activities of the credit department are affected by various antitrust laws to be examined in this lesson

CCP 11 Financial Statement Analysis Part 1

- Overview
- Myths and misconceptions about financial statement analysis
- Limitations of financial statement analysis
- Mistakes to avoid in analysis
- What to ignore in financial statement analysis
- How to obtain statements
- Thorough discussion of commonly used ratios in analysis

CCP 12 [Financial Statement Analysis Part 2](#)

- This is not intended to teach you how to do the work of an accountant
- The program is about how to interpret customer financial information, the income statement, balance sheet, statement of cash flows, basic accounting rules, and challenges
- This presentation includes a high level overview of financial statements and financial analysis
 - It is offered from the perspective of what credit pros need to know about creating and evaluating customer financial statements
- GAAP
- This program also helps the credit analyst to understand more about the work done by accounting professionals

CCP 13 [Financial Statement Analysis Part 3](#)

- More in-depth discussion of the statements and samples for interpretation
- Auditors' opinions and types of reports
- International Financial Reporting Standards and statement review under IFRS
- More in-depth review of ratios; use of and samples for review

CCP 14 [Financial Statement Analysis Part 4](#)

So far, we have examined the balance sheet, income statement and statement of cash flows along with:

- Assets, liabilities and equity
- Sales, costs, expenses and profits or losses
- How to get financial information from customers
- Financial ratio analysis
- Trend analysis
- Use and abuse of industry norms
- How to identify a customer's financial strengths and weaknesses

We have examined:

- The statement of cash flows
- GAAP
- IFRS
- Foreign financial statements

The goal of this session is to put everything we have discussed previously, together

- We will examine how creditors use financial statement analysis to make better informed credit decisions

CCP 15 [Credit Risk Management](#)

Credit risk management involves activities that are intended to minimize costs and determine the optimum level of credit risk to accept. This program presents ideas, tips, suggestions and recommendations that you can implement immediately. My goal is to examine both how and why the typical B2B credit department manages risk:

- Along with the ways the credit department could manage credit risk more effectively
- Along with how to draw useful lessons from past experience
- Credit risk mitigation techniques and tools

CCP 16 [How to do Business With Different Types of Entities](#)

This presentation examines different types of business forms your customers can take including corporations, partnerships and proprietorships. The credit department needs to know how the customer has set up their business. Why? Because it matters to us in the context of understanding and evaluating the risk of doing business with the customer.

- For example, the type of business entity will influence:
 - What type of credit reports to request
 - What type of security or collateral to request
 - What type of financial statements to request
 - Who should be required to sign the credit application form
- The risk of doing business with the customer

CCP 17 [Improving Interactions With Sales](#)

Credit is sometimes seen as being at odds with sales. Disagreements are unavoidable. The credit department needs to make it clear our goal is to manage risk, not eliminate risk. During this program, we will discuss:

- The need to understand your company's tolerance for risk so that sales understands your reasons for the decisions made
- What causes and how to improve damaged relationships with sales
- Developing mechanisms for appeals by sales
- You will be given ideas for better relationships with sales
- Advantages for consistent credit decisions, quick and appropriate responses about credit decisions made
- Dispute resolution, and what to say and what not to say to salespeople

CCP 18 [Advanced Negotiation Skills](#)

- In this program, we will examine various techniques to make collectors better negotiators with customers and with other parties
- Learn to negotiate every time a customer does not offer immediate payment in full of the past due balance
- Understand how to negotiate
- Examine ideas improve the outcome of payment negotiations
- Create a strategy for successful negotiation
- Understand the principle of 'win-win' negotiations
- Examine if and when and how and why to make concessions in negotiations with delinquent debtors

CCP 19 [Dispute Deduction Management](#)

- Involvement of others in the company in deduction resolution, including sales
- Different perspective on deduction management
- Use of software
- Write-off considerations
- Tracking and measuring deductions
- Interactions with customers

It is recommended that candidates for certification (CCP & CPC) obtain additional experience in the following areas. Check the published minimum training units required in each of these additional activities:

1. *Customer visitations*
2. *Professional and community service*
3. *Board of Director's service, community and advisory board appointments*
4. *Industry credit group participation*
5. *Supplemental training seminars and programs*
6. *Accounting, Credit, Collection, Distributor and Sales Rep Agreements, Contract and Credit Law Courses*

Application for Council Record/Certificate

CSB WILL ESTABLISH A FILE NUMBER UPON SUBMISSION OF THE INDIVIDUALS APPLICATION ONLY: CSB File No. _____
Applicants may complete this form online. Print completed application. Save a copy for your records.
 Mailing instructions appear on page 7 of this Application.

Application Type (check one): BECCP Plan, CCPTS Plan* or IDP Plan**

Application For (check all that apply): CCP CPC

Name in Full: Mr. Mrs. Ms. _____

Birth Date: _____ Application Date: _____

Business Address: Firm Name: _____

Street Address: _____

City: _____ State/Province: _____ Zip/Postal Code: _____

Residence Address: _____

City: _____ State/Province: _____ Zip/Postal Code: _____

Address for correspondence: Business Residence Daytime Telephone: (_____)_____

E-mail Address: _____ Other Telephone: (_____)_____ Type: _____

Contact Preference: Mail E-mail Fax Fax: (_____)_____

* If a candidate desires to enroll in the Comprehensive Credit Professionals' Training Series, successfully completes one or both CCP or CPC modules and then work in credit and/or collection a minimum of one (1) year each, the Candidate has a fast track to accreditation as a CCP and/or CPC.

** If a candidate has less than five (5) years of experience in business credit or less than five (5) years experience in business collection, check the IDP Plan box. IDP Training record materials will be sent. (Intern Development Program)

A. Registration/History

1. Jurisdiction Registration: (Check Your Credit Associations Location)

- BCMA ~ NEW BERLIN, WI CMA ~ LAS VEGAS, NV FCFP ~ SOUTH PLAINFIELD, NJ
 MSCCM ~ DENVER, CO NACS ~ OVERLAND PARK, KS SWBCS ~ PHOENIX, AZ

2. List all other registrations (with registration number if applicable and date acquired) in which you currently hold or have previously held a registration in an accreditation or credentialing program.

Specify or List the Profession below:	Specify or indicate credential and/or license below:
1.	
2.	
3.	

- 3.** Have you ever been denied registration? Yes No
- 4.** Has your registration ever been suspended or revoked? Yes No
- 5.** Have you ever surrendered or allowed your registration to lapse in any of the programs listed?
 Yes No

Name: _____

EXAMS TAKEN FOR CREDENTIALING

B. Examination History

Describe or provide name of exam(s) taken and date.

Exams completed

Identify profession or source & date:

- Professional Exam taken: _____
- Professional Exam taken: _____
- Professional Exam taken: _____
- Other Written Exam taken: _____
- Other: _____

CSB
Use
Only

C. Education History

1. High School Attended	Dates of Attendance (From-To)	Highest Grade Completed	Year Graduated

2. Colleges, Universities and Technical Schools Attended	Dates of Attendance (From-To, Month-Year)	Full Name of Degree Received* **	Date Degree Received (Month-Day-Year)

****Specify major in which degree was earned. **If no degree, indicate total credit hours earned, specify using semester or quarter system.***

Name: _____

D. Experience Employment Training History

Give the full name and complete address of each employer. Include all periods so that no gaps appear in the chronological listing. Begin with first employer. List each period of continuous employment separately even if for the same employer. If any of the conditions of employment change (i.e., full-time/part-time status, type of firm), list each period separately.

Employer/Firm Name: _____

Employer Address: _____

CSB
Use
Only

Dates of Employment			Length of Time		Status: Reported to; Check Appropriate Category					Type of Firm Check Appropriate Category					
FROM		TO	FULL TIME	*PART -TIME (LESS THAN 35 HRS PER WEEK)	EMPLOYEE W/ CREDIT/COLLECTION SUPERVISOR	EMPLOYEE W/OUT CREDIT/COLLECTOR SUPERVISOR	CPA	CFO/TREASURER CONTROLLER OTHER	SELF-EMPLOYED	MANUFACTURER	WHOLESALE	BANKING	SERVICE INDUSTRY	TEACHING OR RESEARCH	OTHER**
M O	D A Y	Y R	M O	D A Y											

Current or Last Job Title @ Employer: _____

Describe or list three (3) Primary Responsibilities while in this position:

1.
2.
3.
Other Comments:

Employer/Firm Name: _____

Employer Address: _____

Dates of Employment			Length of Time		Status: Reported to; Check Appropriate Category					Type of Firm Check Appropriate Category					
FROM		TO	FULL TIME	*PART -TIME (LESS THAN 35 HRS PER WEEK)	EMPLOYEE W/ CREDIT/COLLECTION SUPERVISOR	EMPLOYEE W/OUT CREDIT/COLLECTOR SUPERVISOR	CPA	CFO/TREASURER CONTROLLER OTHER	SELF-EMPLOYED	MANUFACTURER	WHOLESALE	BANKING	SERVICE INDUSTRY	TEACHING OR RESEARCH	OTHER**
M O	D A Y	Y R	M O	D A Y											

Current or Last Job Title @ Employer: _____

Describe or list three (3) Primary Responsibilities while in this position:

1.
2.
3.
Other Comments:

Name: _____

D. Experience Employment Training History (Continued)

Employer/Firm Name: _____

Employer Address: _____

Dates of Employment						Length of Time		Status: Reported to; Check Appropriate Category					Type of Firm Check Appropriate Category					
FROM			TO			FULL TIME	*PART -TIME (LESS THAN 35 HRS PER WEEK)	EMPLOYEE W/ CREDIT/COLLECTION SUPERVISOR	EMPLOYEE W/OUT CREDIT/COLLECTOR SUPERVISOR	CPA	CFO/TREASURER CONTROLLER OTHER	SELF-EMPLOYED	MANUFACTURER	WHOLESALE	BANKING	SERVICE INDUSTRY	TEACHING OR RESEARCH	OTHER**
M	D	Y	M	D	Y	✓	HOURS/ WEEK											

Current or Last Job Title @ Employer: _____

Describe or list three (3) Primary Responsibilities while in this position:

1.
2.
3.
Other Comments:

Employer/Firm Name: _____

Employer Address: _____

Dates of Employment						Length of Time		Status: Reported to; Check Appropriate Category					Type of Firm Check Appropriate Category					
FROM			TO			FULL TIME	*PART -TIME (LESS THAN 35 HRS PER WEEK)	EMPLOYEE W/ CREDIT/COLLECTION SUPERVISOR	EMPLOYEE W/OUT CREDIT/COLLECTOR SUPERVISOR	CPA	CFO/TREASURER CONTROLLER OTHER	SELF-EMPLOYED	MANUFACTURER	WHOLESALE	BANKING	SERVICE INDUSTRY	TEACHING OR RESEARCH	OTHER**
M	D	Y	M	D	Y	✓	HOURS/ WEEK											

Current or Last Job Title @ Employer: _____

Describe or list three (3) Primary Responsibilities while in this position:

1.
2.
3.
Other Comments:

CSB
Use
Only

Name: _____

D. Experience Employment Training History (Continued)

Employer/Firm Name: _____

Employer Address: _____

CSB
Use
Only

Dates of Employment						Length of Time		Status: Reported to; Check Appropriate Category					Type of Firm Check Appropriate Category					
FROM			TO			FULL TIME	*PART -TIME (LESS THAN 35 HRS PER WEEK)	EMPLOYEE W/ CREDIT/COLLECTION SUPERVISOR	EMPLOYEE W/OUT CREDIT/COLLECTOR SUPERVISOR	CPA	CFO/TREASURER CONTROLLER OTHER	SELF-EMPLOYED	MANUFACTURER	WHOLESALE	BANKING	SERVICE INDUSTRY	TEACHING OR RESEARCH	OTHER**
M	D	Y	M	D	Y	✓	HOURS/ WEEK											

Current or Last Job Title @ Employer: _____

Describe or list three (3) Primary Responsibilities while in this position:

1.
2.
3.
Other Comments:

Employer/Firm Name: _____

Employer Address: _____

Dates of Employment						Length of Time		Status: Reported to; Check Appropriate Category					Type of Firm Check Appropriate Category					
FROM			TO			FULL TIME	*PART -TIME (LESS THAN 35 HRS PER WEEK)	EMPLOYEE W/ CREDIT/COLLECTION SUPERVISOR	EMPLOYEE W/OUT CREDIT/COLLECTOR SUPERVISOR	CPA	CFO/TREASURER CONTROLLER OTHER	SELF-EMPLOYED	MANUFACTURER	WHOLESALE	BANKING	SERVICE INDUSTRY	TEACHING OR RESEARCH	OTHER**
M	D	Y	M	D	Y	✓	HOURS/ WEEK											

Current or Last Job Title @ Employer: _____

Describe or list three (3) Primary Responsibilities while in this position:

1.
2.
3.
Other Comments:

Make additional copies of Form 1-5 as necessary and submit those additional sheets to CSB.

* If part-time work is noted, state average number of hours per week.
 ** If "other" kind of work is noted, describe on a separate page.

NAME: _____

Special Service, Accomplishments and Recognition in Business Credit & Collection

E. Leadership, Counselor and Executive Service History

Applicants may list those activities or roles here, in which they served, advised or provided leadership to their field or peers.

Sponsor:	Position:	Date/Term:
Activity:		

Sponsor:	Position:	Date/Term:
Activity:		

Sponsor:	Position:	Date/Term:
Activity:		

F. Speaker, Presenter, Teacher and Author Service History

Applicants may list those activities here, in which they served their field or peers.

Sponsor:	Position:	Date/Term:
Activity:		

Sponsor:	Position:	Date/Term:
Activity:		

Sponsor:	Position:	Date/Term:
Activity:		

NAME: _____

G. Affidavit

"The applicant acknowledges that the Credentialing Standards Board (the Council) will compile and evaluate a Record with respect to all aspects of the applicant's career. The applicant agrees to provide any additional information in connection with the investigation as may be required by the Council.

"The applicant hereby authorizes the Council to transmit the applicant's Council Record and all other pertinent information obtained in the course of its investigation to any/all board members responsible for reviewing, evaluating and assessing a candidate's application.

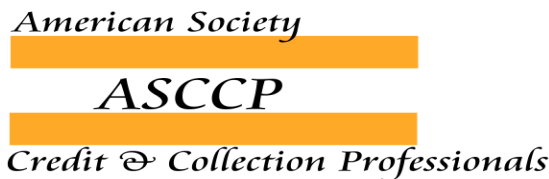
"In consideration of the services to be rendered by the Council, the applicant hereby releases, discharges, and exonerates the Credentialing Standards Board, its officers, directors, and agents from any and all liability of every nature and kind arising out of the transmission of information concerning the application."

By checking the box below, the applicant acknowledges that he/she is the person making the foregoing statements and that they are made in good faith and are true in every respect.

I acknowledge the foregoing statements.

I would like BCMA to notify my immediate supervisor or employer if my Application for Council Record & Certificate(s) are awarded:

Mr./Ms.	Supervisor's First Name	Last Name	Professional's Designations
Title		Company - Employer	
Mailing Address		City	State Zip code



Submit the entire Application for Council Record/Certificate and the appropriate filing fees.

Filing Fee to establish Council Record: \$125, Filing Fee for Accreditation Certificate(s): \$175

Filing Fee for second review for Accreditation Certificate(s): \$100

Make Checks Payable to:

Business Credit Management Association

CSB Council Records

PO Box 510157

15755 W. Rogers Drive, Ste 200

New Berlin, WI 53151-0157

Or Call to process credit card payment.

Or Invoice me at my company.

Applicant Print Name

Signature

Date: