



CAFM

(Community Association Financial Management)

Certification Application

REQUIREMENTS FOR CAFM CERTIFICATION

1. Complete and pass the six required CAFM certification courses noted below (A-F).
2. Email a completed CAFM certification application including certification fee to certification@cacm.org.
3. Request each of your three references to email their Recommendation form directly to certification@cacm.org.
 - *Though you may become a member and begin the CAFM certification process without having HOA industry experience by completing the six required CAFM certification courses; **three years accounting or finance work experience, or be employed within community association management in accounting/finance functions full-time for a minimum of 12 months experience is required in order to submit this CAFM certification application.***
 - *It does not matter what order you take the six required courses and each course is valid for three years.*
 - *BAM & CA Law may be taken two ways; 1.) Two day live course or 2.) Via "Challenge" (online).*
 - *Ethics for Community Managers CMM130 is NOT offered via "Challenge" this 4 hour live course.*
 - *Courses D-F below are each offered online.*
 - *Education credits earned through an organization other than CACM do not transfer over to a CAFM certification; this includes all outside Ethics and law related courses.*
- A. CMM101-CMM102 **The Basics of Association Management (BAM)** Series - *this represents 16 hours of general community management education designed to give you a comprehensive overview of the industry and roles within the industry.*
- B. CMM122 **California Law Series Module II (only)** Financial Management - *this represents 4 hours of Financial Management*
- C. CMM130 **Ethics for Community Managers** - *during this four-hour live course, you will explore a variety of scenarios that demonstrate the official rules of conduct for community managers, including a review of CACM's Code of Professional Ethics and Standards of Practice. You may NOT substitute CMM230 Ethics for Recertification only or LDR500 Advanced Ethics.*
- D. FIN300 **Budgeting** - *this represents 4 hours of builds material incorporating real-life examples and hands-on activities to help you learn how to analyze and use reserve funding plans; budget for conversions and new construction; and utilize the budget and reserve study to help the board make fiscally responsible financial decisions.*
- E. FIN210 **Assessment Collections** - *this represents 4 hours of instruction providing you with the knowledge you need to assist your board in meeting its fiduciary responsibility to levy and collect assessments.*
- F. FIN320 **Strategic Financial Planning** - *this represents 4 hours of instruction preparing you to assist your boards in developing a strategic approach to fund planning and provide you with the ability to articulate the various elements and options to choose from in their desire to achieve financial stability.*

PROCESS TO BECOME CERTIFIED

1. If you have not yet become a member; please email the CACM Manager Member Application (\$235) to membership@cacm.org for processing. Once complete you will receive a new membership email confirmation, then you may register online for courses at member rate.
2. Register for your six required CAFM certification courses and pass all required online exams for each.
3. Read the CACM Code of Professional Ethics and Standards of Practice in its entirety. The COE may be found on www.cacm.org or you may request it at certification@cacm.org.
4. Email your complete, signed CAFM certification application (\$180) to certification@cacm.org.
5. Page 5 of the application is the confidential recommendation form. Please email this form to three references & have them complete it and email it directly to certification@cacm.org. (1 board/committee member, 1 Employer & 1 CCAM, CAFM, MCAM or CAMEX) **Note: Recommendation forms will not be accepted from your email address.**

When applicant is the owner of a company: In lieu of your Employer Recommendation form, you may submit 2 recommendation forms from a board or committee member and 2 recommendation forms from a CCAM, CAFM, MCAM or CAMEX. CACM also requires a copy of these three items: 1.) Business License 2.) Articles of Incorporation 3.) Company DBA filing. *In lieu of a business license, CACM will accept: Insurance declarations page or bank statement.*

NOTIFICATION OF CAFM CERTIFICATION STATUS

Once courses are passed and certification application including \$180 fee is received, you will receive an official email notification congratulating you on earning your CAFM. Once you receive this, you may add the CAFM designation after your name in signature blocks and on business cards. In addition, you will receive a CAFM certificate within approximately 14 business days.

RECERTIFICATION

Your CAFM certification is valid for three years, which means you will have three years from the date you were officially certified by CACM to complete a total of 30 CEUs; including one CACM Law Seminar & Expo (8 CEUs) and one CACM Ethics course (4 CEUs). You may take either CMM130 live Ethics for Community Managers again or CMM230 Ethics online – however; you may NOT yet take LDR500 Advanced Ethics until you have **RE**-certified at least once.

Annual Membership and Certification fees are due each January 1 and BOTH are required in order to maintain your CAFM certification. Suspension of membership and certification may take effect if; 1.) fees are not paid by deadline 2.) CEUs are not completed by deadline 3.) Recertification application is not received within 30 days of deadline.

California Association of Community Managers, Inc.SM

23461 South Pointe Drive, Suite 200, Laguna Hills, CA 92653 | certification@cacm.org | 949.916.2226 | www.cacm.org



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Applicant First Name _____	Applicant Middle Initial _____	Applicant Last Name _____
Applicant Nickname/Salutation (if applicable) _____		Applicant Title _____
Have you ever held CACM membership under any other name? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, under what name? _____		
REQUIRED (not for publication)		
Residence Address _____ Residence City _____ State _____ Zip Code _____		
Personal Phone/Cell # _____ Personal Email Address: _____		
Check all professional designations, licenses & degrees that you possess		
<input type="checkbox"/> CPM	<input type="checkbox"/> GED	<input type="checkbox"/> Real Estate License
<input type="checkbox"/> High School Diploma	<input type="checkbox"/> GED	<input type="checkbox"/> BA/BS
<input type="checkbox"/> Other Please clarify _____	<input type="checkbox"/> RE Broker License	<input type="checkbox"/> CFP
	<input type="checkbox"/> MBA	<input type="checkbox"/> CPA
		<input type="checkbox"/> PhD
Are you presently employed? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Is this a paid position? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Dates of current employment From _____ To: _____		
Have you been employed within Association Management for at least twelve (12) months? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Do you have at least three years accounting or finance work experience? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Business or Association Name _____	Business Phone # _____	
Business Address _____	Business Website _____	
Business City _____ State _____ Zip Code _____	Business Email: _____	
Are you the Owner/CEO/President/Sole Proprietor of the Business? <input type="checkbox"/> Yes <input type="checkbox"/> No		
If you checked Yes, please check <input type="checkbox"/> N/A, and include with your application submittal the owner required documents as stated on first page.		
If you checked No, please note Supervisor Name _____ Title _____ Email Address: _____		
If you are NOT presently employed within community association management or if you have worked for your current employer in a financial management capacity for less than 12 months , please complete this section:		
Previous Employer Name _____	Previous Employer Phone # _____	
Previous Employer Address _____	Previous Employer Email: _____	
Indicate your function(s) & % of time spent: Financial Mgmt. _____% Assoc. Mgmt. _____% Supervisor of Assoc. Mgrs. _____%		
Other _____% Describe _____		
Have you worked for a CCAM, CAFM, MCAM or CAMEX? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, please state name _____		



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- | | | |
|---------------------------------|--------------------------------|---|
| Yes
<input type="checkbox"/> | No
<input type="checkbox"/> | Have you ever been involved in reorganization for the benefit of creditors or in bankruptcy proceedings as a debtor? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you ever been involved in either civil or criminal legal proceedings as a defendant in which there were allegations of fraud, misrepresentation, or misappropriation of funds or property? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you ever been refused bonding, fidelity or crime insurance, or had any such coverage canceled? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you ever been subject to disciplinary action by CACM or any other professional association? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you ever had a professional license suspended or revoked or otherwise been subject to disciplinary action by any licensing agency? |
| <input type="checkbox"/> | <input type="checkbox"/> | Have you ever been convicted of or pled no contest to a felony? |

If you answered "yes" to any of the questions above, please complete a detailed explanation below and answer the following questions:

Was this a business issue? Yes No If yes, did this pertain specifically to association management? Yes No

Was this a personal issue? Yes No If yes, please note date here: _____

Explanation: _____

Certification requires you perform a minimum of 10 of the following functions of financial community association management. Please indicate a % of time for each function YOU perform, the percentages must add up to 100%.

Management/administration of association daily financials affairs	_____ %
Provide guidance/assistance to boards of directors regarding the interpretation of governing documents, codes & parameters related to financial activities & affairs of the association	_____ %
Duties include owner/resident/tenant communications and acting as liaison regarding the financial activities of the association	_____ %
Identify and report financial anomalies to the association	_____ %
Oversee the billing and or collection of assessments and the application of delinquency control policy of the association	_____ %
Respond to escrow demand statements, request for disclosures, and third-party requests for access to association documents	_____ %
Coordinate with financial institutions regarding association funds, updating bank signature cards, investment of reserve funds and related activities	_____ %
Cause to be prepared interim financial statements and accompanying documents that comply with Civil Code Section 1365.5	_____ %
Coordinate with CPA to prepare annual financial statements in compliance with Civil Code Section 1365	_____ %
File various federal and state documents mandated by law, including, but not limited to, 1099 forms, payroll tax returns, estimated tax payments, etc.	_____ %
Maintain vendor and supplier histories, including invoices, payments, tax ID numbers, and other information required to properly report expenses and payments	_____ %
Maintain corporate financial records either electronically or as original documents as directed by the board of directors	_____ %
Other (please specify) _____	_____ %
Total:	100%



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APPLICANT SIGNATURE SECTION

This application is submitted to CACM with the understanding that:

- The information provided will be used to assist CACM in reviewing the applicant’s eligibility for Certified Community Association Manager status.
- Additional information that may be required by CACM shall be supplied promptly upon request.
- The information provided is complete and correct to the best of the applicant’s knowledge.
- The information will be considered confidential, except as may be required to process and approve the application.
- There are no actions charged against the applicant or challenges to the applicant’s responsibility, character or integrity.
- Any information or comment furnished to CACM by any person or response to an invitation to provide information shall be conclusive, deemed to be privileged, and not form the basis of any action by the applicant for slander, libel or defamation of character. CACM reserves the right to document all information contained herein.
- The applicant agrees to waive any and all claims against CACM, its officers, directors, employees, agents, attorneys and members arising out of any act or omission in connection with the consideration, rejection or acceptance of this application, or any act or omission by CACM in disappointing the applicant if the application is not approved, including any suspension or expulsion of the applicant as a CCAM program applicant.
- The applicant wholeheartedly subscribes to the official CACM Code of Professional Ethics and Standards of Practice.
- The applicant understands his/her responsibility to provide CACM with current place of business and any subsequent changes.
- The applicant understands and agrees to permit the Professional Standards Committee to review this application and any attachments or subsequent information submitted or obtained related to the application and investigate any portions as it may deem necessary.
- The applicant understands that if his/her membership or certification is terminated as a result of a disciplinary action by the Professional Standards Committee, he/she will not be eligible to reinstate or reapply for either.

In addition to the foregoing, each applicant shall have the duty and the responsibility to arbitrate controversies arising out of management contracts and the community association management business with any and all forms of associations as specified in the CACM Code of Professional Ethics and Standards of Practice.

By my signature below:

- I verify that all information on this application is accurate; I acknowledge that I have read the rules and regulations stated above and authorize CACM and/or its agents to verify all items listed.
- I have read through the complete Code of Professional Ethics and Standards of Practice of the California Association of Community Managers, will abide by its code, which may be duly amended from time to time; and will be subject to procedures for compliance and/or disciplinary action.

Applicant Signature _____

Applicant Printed Name _____

Date _____



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Application & Maintenance Fees

	<input type="checkbox"/> Member	<input type="checkbox"/> Non-Member
Certification Application Fee	\$75	\$175
Certification Maintenance Fee	\$105	\$500
Total due:	\$180	\$675

Applicant First Name	Applicant Middle Initial	Applicant Last Name
Applicant Business or Association Name		
Business Address		
Business City	Business State	Zip Code
Business Phone #	Business Email:	

Total Amount Due:	<input type="checkbox"/> \$180 <input type="checkbox"/> Other _____		
<input type="checkbox"/> Check Enclosed (do not staple check to form)			
<input type="checkbox"/> Amex	<input type="checkbox"/> Discover	<input type="checkbox"/> MasterCard	<input type="checkbox"/> Visa
Card Number:			CVV Number:
Expiration Date:			Billing Zip Code:
Cardholder Name:			
Signature (required):			
<input type="checkbox"/> Please email a receipt to:			



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Confidential Recommendation Form

Applicant First Name	Middle Initial	Applicant Last Name
APPLICANT DIRECTIONS:		
<p>Once you have noted your full name above, please email this form to each reference. Reference must then complete the form and email it directly from their email to certification@cacm.org. No recommendation forms will be accepted from the applicant's email.</p> <p>Applicant is required to obtain a total of 3 recommendations; 1 board/committee member, 1 employer and 1 CCAM, CAFM, MCAM or CAMEX.</p> <p><i>Note:</i> If you are the owner/sole proprietor of the business or association; in lieu of submitting a CCAM/Employer recommendation form, please submit 2 board/committee member recommendations and 2 CCAM, CAFM, MCAM or CAMEX recommendations.</p> <p>Because the CAFM Certification Application and Recommendation Forms expire 6 months from the date of signature, CACM suggests applicant register for the 3 required certification courses PRIOR to submission.</p>		
<p>Please check <u>ONLY ONE</u> box that describes your relationship to Applicant</p> <p>I am a <input type="checkbox"/> Present or <input type="checkbox"/> Former Employer of the Applicant</p> <p><input type="checkbox"/> I am a CCAM <input type="checkbox"/> I am a CAFM <input type="checkbox"/> I am a MCAM <input type="checkbox"/> I am a CAMEX</p> <p><input type="checkbox"/> I am a Board/Committee Member of the Applicant</p>		
Name of Reference	Title of Reference	
Reference Association/Business Name _____		
Reference Address _____ City _____ State _____ Zip Code _____		
Reference Phone/Cell # _____ Reference Email Address _____		
Time Associated with Applicant <input type="checkbox"/> under 1 year <input type="checkbox"/> 1-4 years <input type="checkbox"/> 4-6 years <input type="checkbox"/> 6-8 years <input type="checkbox"/> 8 or more years		
How would you describe the Applicant's moral character, integrity, sincerity of commitment to community association management as a professional, and ability to provide financial management for community associations?		
Please rate Applicant's ability to provide accounting functions within community association management?		
<input type="checkbox"/> Poor <input type="checkbox"/> Fair <input type="checkbox"/> Good <input type="checkbox"/> Very Good <input type="checkbox"/> Excellent		
Do you recommend this Applicant for CAFM certification? <input type="checkbox"/> No, I do not <input type="checkbox"/> Yes, I do		
<small>Recommendation Forms expire six (6) months from date of signature.</small>		
Reference Signature _____		
Reference Printed Name _____ Date _____		