

# CHECKLIST FOR CPFA APPLICATION

- I have been a member of APT US&C for 24 months.
- I agree to the conditions of the Eligibility Certification and I have signed the application.
- I have included documentation for a maximum of 60 points in any combination of Work Experience Standards and Other Experience Standards.
  - All of my Work Experience points were earned during the past 15 years and do not exceed 40 points.
  - I have included the proper documentation for all of my Work Experience points and, if I used the Job Verification Form, it has been signed by at least one person in addition to myself.
  - I have included the proper documentation for all my Other Experience points.
  - I have not exceeded the maximum points in any Experience Standards area. (i.e., not claimed more than 5 points for service as a committee member or more than 12 points for attendance at state/province APT association conferences)
- I have included the proper documentation for a maximum of 60 Education Standards points.
  - I have not exceeded the maximum points allowed in any Education Standards area. (i.e., not claimed more than 10 points for pre-approved treasury-related education programs by non-APT statewide or province-wide organizations or more than 50 points for completion of college or university courses related to treasury management)
- I have included a check for \$200 in US funds made payable to APT US&C.
- I have included two complete copies of the application.

**Examples of proper documentation for Other Experience Standards points.**

Attendance at APT US&C or state/province APT association - A copy of the attendance roster or a copy of the completed registration form.

Service as a member of a committee of APT US&C or state/province APT association - A copy of a committee list or committee participation certificate.

Service as a committee chair of APT US&C or state/province APT association - A copy of a committee list, notice of appointment, or minutes of meeting when appointment was made.

Service as a director or officer of APT US&C or state/province APT association - A copy of letterhead that lists directors and officers, minutes of meeting when election or appointment occurred, or certificate of service as director or officer.

Completion of recognized national professional achievement certification programs related to treasury management (CCM, CGFM, CPA, CMA, CPFO, CFE, CIA) - A copy of the license or certificate or any other type of verification

Recipient of special awards presented by APT US&C or state/province APT association - A copy of award, copy of newsletter or newspaper article announcing award, or any other type of verification..

### **Examples of proper documentation for Education Standards points.**

Completion of Bachelor, Masters, or Doctoral Degree - A copy of official transcript.

Completion of college or university courses related to treasury management - A copy of official transcript.

Completion of APT-approved state, regional, or provincial course of higher education conducted under an accredited program - Certificate of completion or other documentation of attendance.

Attendance at pre-approved educational programs related to treasury management sponsored by APT US&C or state/province APT association - A copy of the CPFA point sheet for the program, a certificate of completion that includes the CPFA points earned, a copy of the attendance roster and a copy of the agenda for the program or any other verification that verifies attendance and the points earned.

Completion of approved treasury-related education by non-APT statewide organization - Verification of attendance and a copy of the agenda for the program.

**These examples are not meant to be all-inclusive but should give the applicant suggestions for proper documentation.**