

CDMM® Documentation of Experience/ Pre-certification Hours Worked

EXAMPLE

In addition to the CDMM® Certification application, applicants are required to include a separate attachment, with written explanation of the work performed within the last three years to satisfy the requirement for paid and pro bono/volunteer work experience. The types of tasks that qualify for pre-certification hours are outlined in the https://secure.aadmm.com/wp-content/uploads/2020/03/2014_CDMM_Certification_Exam_Content_-Outline.pdf.

Below is an example of how this information should be submitted:

Paid Hours

Client W – 20 hours per month from (include date range i.e. March 2019– March 2020)

Total = 240 hours

Duties Performed:

- Bill Paying
- Opening/sorting mail
- Monthly Bank Reconciliation
- Working with creditors
- Generate tax information
- Utilize online bill pay services
- Handle vendor issues

Client X – 12 hours per month from (date range)

Total = XX hours

Duties Performed:

- Bill Paying
- Opening/sorting mail
- Monthly Bank Reconciliation
- Working with creditors
- Generate tax information
- Insurance and medical issues
- Budgeting
- Assisted client with evaluating housing options (for in-laws)

Client Y – hours per month from (date range)

Total = XX hours

Duties Performed:

- Bill Paying
- Opening/sorting mail
- Monthly Bank Reconciliation
- Working with creditors
- Generate tax information
- Insurance and medical issues
- Handle vendor issues
- Budgeting
- Home financing options for client

Total paid hours = 1608 hours