



Society of Defense Financial Management

CDFM Recertification Policy



Recertification Overview

Every credible program of professional certification has a mechanism to ensure that certificants remain current. To ensure certificants remain current in defense financial management,

Certified Defense Financial Managers (CDFMs) and Certified Defense Financial Managers with Acquisition Specialty (CDFM-As) must:

- **Adhere to the SDFM Pledge** of Professionalism (see appendix)
- Pay a **recertification fee**
- Earn **80 hours of Continuing Professional Education (CPE) every 24 months**
 - **2 CPEs** must be in **ethics**-related topics
 - Complete **at least 20 CPEs per year**
 - Note: CPEs must be earned after certification is awarded

Recertification Due Dates

Recertification is due **on the last day of the month** two years after the month certification was awarded, aligning with **odd** or **even** years:

- CDFM awarded June 1, 2024 → Recertification due June 30, 2026
- CDFM awarded May 17, 2025 → Recertification due May 31, 2027

CDFM-A certificants retain the same recertification cycle as their original CDFM certification. **No additional CPEs or fees are required for the CDFM-A designation.**

Acceptable CPEs (See Appendix)

The CPE requirements are based on the premise that all CDFMs should maintain and enhance their professional proficiency in defense financial management. As stated in the SDFM Pledge of Professionalism, we should “continuously strive to increase...professional knowledge and skills.” CDFMs will have wide latitude in selecting suitable CPEs.

A CPE is defined as one 50-minute learning session in a subject related to the technical field certified. CPEs earned for other approved financial certifications (e.g., CPA, DFMC, etc.) also count toward CDFM requirements. However, **CPEs cannot be carried over** from one recertification cycle to the next.

Personal Responsibility & SDFM Support

Meeting CPE requirements is the **responsibility of the individual certificant**, who must:

1. Seek appropriate CPE opportunities
2. Complete CPE activities
3. Maintain documentation
4. Monitor progress toward meeting the CPE requirements

SDFM supports certificants by:

- Providing a **CPE tracking tool** in member accounts
- Sending **courtesy reminders** 3 months, 2 months, and 1 month prior to expiration (use a personal email to ensure delivery)

Documentation & Audits

- Certificants must submit 80 CPE hours in the CPE tracking tool in the “My CPEs” section of their SDFM account to recertify.
- Records should be kept for **at least 2 years after recertification**.
- **5-10%** of certificants are selected for **CPE audit** and must submit documentation electronically. SDFM will reach out to you directly if you are under audit.

Extensions

Certificants may request **one 90-day extension** per cycle by emailing certification@sdfm.org. An **additional 30 days** may be granted for documentation submission. CPEs earned during the extension **cannot be applied to the next cycle**.

Expired or Inactive Status

In honor of the CDFM’s 25th anniversary, we are currently holding a **CDFM Reactivation Campaign**. We invite all of you with an inactive CDFM or CDFM-A to come back into the fold! Simply send an email to certification@sdfm.org and request reactivation, then pay the regular recertification fee.

Note: The regular reactivation process for expired CDFMs/CDFM-As is to submit proof of 80 CPEs and pay the recertification fee plus a reactivation fee, and those expired for longer than 24 months would need to restart the certification process.

Exceptions

Certificants may request an exception, in that case that a situation interfered with the ability to recertify, including:

- Foreign residency
- Ill health
- Maternity leave
- Military service

Requests must include documentation and show that an effort was made to meet the requirements during the cycle. Requests are submitted to certification@sdfm.org and reviewed by the Certification Department or Commission as needed.

Revocation and Reinstatement

SDFM and/or the Certification Commission may **suspend or revoke certification** for:

- Ethical violations
- Violations of the SDFM Pledge of Professionalism
- Conduct discreditable to the program

Revocation will follow due process as outlined by procedures established by the SDFM National Executive Committee. Individuals whose certification is revoked must cease all use of the CDFM designation and must remove all references to the certification from titles, qualifications, and communications.

Revocation is typically permanent. However, after one year, individuals may reapply to the CDFM Program. If approved, they must complete the full certification process, including retaking all required exams.

Appeals

Suspended or revoked certificants have **30 days** from the date of notification to appeal to the Certification Commission. The Commission's decision is final.

Certified Retired Status

CDFMs who have **permanently retired** from defense financial management may request **Certified Retired** status, which:

- Waives CPE and recertification fee requirements
- Can be reversed by completing 80 CPEs (within the prior two years) and paying the current recertification fee

APPENDIX A

SDFM PLEDGE OF PROFESSIONALISM

1. Be guided in all activities by loyalty to the highest principles always remembering that public office is a public trust.
2. Refrain from activities which are in conflict with the public interest or are discreditable to the Society, and to avoid activities which create the appearance of such conflict.
3. Exercise diligence, objectivity and integrity in professional activities, ever aware of the responsibility to eliminate improprieties.
4. Refrain from the transmission or usage, for personal gain or advantage, of information obtained in the professional environment.
5. Carefully earn and continuously protect my reputation for good moral character in comptrollership.
6. Recognize that professional example will influence associates and efficiency.
7. Recommend and initiate methods to enhance productivity and efficiency.
8. Continuously strive to increase my professional knowledge and skills to improve service and value to associates and the Society.
9. Extend the same consideration to the rights and interests of others that I seek for myself.
10. Respect the professionalism of fellow-members and work with them to promote the goals and programs of the Society.

APPENDIX B

FINANCIAL MANAGEMENT CERTIFICATIONS APPROVED FOR OVERLAPPING CPE COVERAGE

Accredited Business Accountant (ABA)
Accredited in Business Valuation (ABV)
Certified Accounts Payable Professional (CAPP)
Certified Business Manager (CBM)
Certified Cost Consultant (CCC)
Certified Cost Estimator/Analyst (CCE/A)
Certified Forensic Accountant (Cr.FA)
Certified Fraud Examiner (CFE)
Certified Government Financial Manager (CGFM)
Certified in Financial Forensics (CFF)
Certified Information Systems Auditor (CISA)
Certified Internal Auditor (CIA)
Certified Management Accountant (CMA)
Certified Payroll Professional (CPP)
Certified Public Accountant (CPA)
Certified Quality Auditor (CQA)
Certified Treasury Professional (CTP)
DoD Acquisition Corps Certification
DoD Financial Management Certification (DFMCP)
Forensic Certified Public Accountant (FCPA)

--And others, as appropriate. Please notify Certification Department staff to have your program verified and added to this listing.

APPENDIX C

EXAMPLES OF ACCEPTABLE CDFM CPE TOPICS

- Accounting Principles & Standards
- Accounting Systems
- Analytical Procedures
- Assessment of Internal Controls
- Assessment of Management Controls
- Asset Management Systems Management
- Audit Methodologies
- Audit of Contract Compliance/Costs
- Audit Risk & Materiality Management
- Audit/Evaluation Standards
- Audit Readiness
- Budgeting
- Business Law
- Business Process Reengineering
- Compliance with Laws & Regulations
- Comptrollership
- Computer Science
- Computer Security
- Contracting and Procurement
- Cost Analysis
- Data Analysis
- Economics
- Electronic Data Processing
- Enterprise Risk Management & Internal Controls
- Evaluation Design
- Financial Auditing
- Financial Management Leadership
- Financial Management/Systems
- Financial Planning or Analysis
- Fiscal Law
- Financial Reporting
- Forecasts and Projections
- Fraud Detection & Prevention
- Industrial Engineering
- Information Resources
- Information Technology
- Interviewing Techniques
- Municipal Level Financial
- Operations Research
- Oral & Written Communications
- Pension Accounting
- Performance Measurement & Reporting
- Principles of Management & Supervision
- Productivity
- Program Planning & Evaluation
- Proposal Evaluation & Award
- Public Administration
- Public Finance
- Public Policy and Structure
- Quality Control
- Report Writing
- State Level Financial Management
- Statistical Methods
- Social Sciences
- Strategic Planning
- Taxation
- Working Capital Funds

APPENDIX D

CRITERIA FOR CPE CREDIT

Criteria for CPE Credit for Technical Subjects

While the CDFM Program does not mandate detailed criteria for qualifying CPE events, it requires that all CPEs contribute to a certificant's professional proficiency and that documentation is maintained.

To help determine whether a program qualifies and to support documentation, consider the following best practices:

1. **Agenda or outline** is prepared in advance and retained by the program sponsor that includes
 - Instructor name(s)
 - Topic(s) covered
 - Date(s) and duration
 - learning objectives and prerequisites (if applicable)
2. **Content is developed** by individuals qualified or experienced in the subject matter
3. **Instructors or discussion leaders** are qualified or experienced in the topic
4. **Program materials** are technically accurate, current, and support the learning objectives
5. **Peer review** is conducted when appropriate, depending on the program's complexity and format
6. **Participant registration** is required
7. **Attendance is tracked** by the sponsoring organization
8. **Program evaluations** are collected from participants and/or instructors when appropriate
9. **Proof of completion** is provided, such as a certificate, transcript, or official confirmation letter

Topics, Programs & Activities That Qualify for CPE

Qualifying CPE Topics

CPEs should relate to **defense or government financial management**, or **technical subjects applicable to those areas**. A list of example topics is provided in the appendix.

Because relevance can vary by role, **each CDFM is responsible** for determining whether a topic is appropriate to meet their CPE requirement. This determination should be based on **professional judgment**, considering factors such as:

- Their experience
- The area(s) of defense financial management in which they work
- Their responsibilities in comptrollership and financial management functions

Qualifying Group Programs

The following types of programs may count toward CPE requirements if they include structured, educational content relevant to financial management:

1. Formal training programs
 - e.g., Enhanced Defense Financial Management Training Course
2. Internal training
 - Briefings, lectures, courses, seminars, and workshops conducted within an organization
3. Structured educational sessions during staff/chapter meetings
 - Only the portion of the meeting involving structured training on topics like accounting principles, auditing standards, or budget functions qualifies
 - Informal discussions or current events updates do not qualify
4. University or college courses
 - Both credit and non-credit courses
 - Audited courses qualify if fully completed and relevant to financial management
5. Professional development events
 - Conferences, conventions, meetings, seminars, and workshops (e.g., SDFM PDI, local chapter events)
6. Programs offered by recognized organizations
 - Includes financial management associations, educational institutions, foundations, and similar groups
7. Preparation and delivery of educational content
 - Includes briefings or work-related materials developed and presented outside routine job duties

Qualifying Individual study programs

CDFMs may earn CPEs for completing **correspondence or self-paced study programs**, provided the program is:

- **Relevant** to financial management
- **Structured** with defined learning objectives
- **Trackable**, with documented completion

Qualifying formats include:

- Correspondence courses
- Self-study guides and workbooks
- Audio, video, or computer-based courses

If a program has been **pretested** by the sponsor to determine an average completion time, CPEs should be based on that average—**not the participant's actual time spent**.

Example: If a program is pretested at **400 minutes** and a participant takes **800 minutes** to complete it, they may still only receive credit for the average:
800 minutes × ½ = 400 minutes → 400 ÷ 50 = 8 CPEs

CPEs are calculated based on **50-minute instructional hours**.

University & College Courses

For university or college courses related to financial management:

- **1 semester hour = 15 CPEs**
- **1 quarter hour = 10 CPEs**

Note: courses must be completed in full and relevant to the CDFM's professional proficiency.

Instructing University & College Courses

CDFMs who teach **credit-bearing university or college courses** may earn CPEs based on the number of credit hours awarded to students:

- **1 semester hour = 15 CPEs**
- **Example:** A 3-semester-hour course = **45 CPEs**

Note: Instructors may not receive CPEs for teaching the **same course more than once** within a two-year period unless the course content has changed significantly.

A maximum of 40 CPEs may be earned through university or college instruction during any two-year recertification cycle.

Speaking or Instructing

Speakers, instructors (university/college noncredit courses) and discussion leaders at programs

CDFMs who serve as **speakers, instructors (for non-credit university/college courses), or discussion leaders** at CPE-eligible programs may earn CPEs for both **presentation and preparation time**, provided the content contributes directly to their professional proficiency.

- **1 CPE** is awarded per **50 minutes of presentation**
- Up to **2 additional CPEs** may be awarded for preparation per 50-minute segment

Example: A 7-hour (350-minute) presentation may earn:

- **7 CPEs** for presentation
- **14 CPEs** for preparation
- **Total = 21 CPEs**

CPEs may not be awarded for repeated presentations within the same two-year cycle unless the content was **substantially revised**.

A maximum of **40 CPEs** may be earned through speaking, instructing, or discussion leadership during any two-year recertification period.

Note: These types of self-generated activities may be more difficult to document, so thorough records (e.g., presentation outlines, published copies, time logs) are strongly recommended.

Authorship

CDFMs may earn CPEs for **writing articles, books, or CPE course materials** on topics related to their professional expertise, provided the content contributes directly to their **professional proficiency** and is **published**.

- **1 CPE** is awarded for each **hour spent writing**
- CPEs are awarded in the **year of publication**
- A maximum of **40 CPEs** may be earned through authorship in any two-year recertification cycle

Note: Developing CPE courses may qualify for CPE credit as authorship if the content contributes directly to professional proficiency and is published or delivered. These types of self-generated activities may be more difficult to document, so thorough records (e.g., presentation outlines, published copies, time logs) are strongly recommended.

Activities That DO NOT Qualify for CPE Credit

The following activities **do not** count toward CPE requirements:

1. **On-the-job training**
2. **Introductory or basic courses** in subjects the CDFM has already mastered or that served as the basis for initial certification
3. **General interest programs** not directly related to professional proficiency (e.g., resume writing, parenting skills, personal investing, or retirement planning)
4. **Sales-oriented programs**, such as equipment demonstrations
5. **Internal administrative training**, including time and attendance reporting or other internal operations
6. **Business sessions** at conferences, conventions, or meetings
7. **Committee participation** as a member of a professional organization
8. **Repeated presentations** – preparation time may only be counted once per presentation, even if delivered multiple times within a cycle
9. **Conducting external quality control reviews**
10. **Full-time teaching** – Routine duties as a university or college instructor do not meet CPE requirements without additional qualifying activities

Determining CPE Credits

CDFMs may earn **1 CPE** for every **50 minutes** of participation in qualifying programs or activities.

- **Standard training sessions** typically include a 10-minute break per hour and still qualify as 1 CPE
- **Fractional CPEs** may be granted when appropriate
- At **conferences or conventions**, sessions of varying lengths should be combined to determine total CPEs

Example:

Two 90-minute, two 50-minute, and three 40-minute sessions = 400 minutes = **8 CPEs**

Important Notes:

- **Only actual attendance time** counts toward CPEs
- **Preparation time for students** (as opposed to instructors) is not eligible for credit
- **Sponsors** should monitor attendance and assign credit accurately

CPE Conversion Equivalents:

- **1 CPE = 1 CET = 1 CLP = 0.1 CEU**

CPE Documentation

Each CDFM is responsible for maintaining records of completed CPEs. A personal log is recommended to track and organize this information.

For each CPE activity, documentation should include:

1. **Sponsoring organization** (e.g., SDFM National Office, local chapter, or another provider)
2. **Location** of the program (e.g., Holiday Inn, Rosslyn, VA)
3. **Program title and brief description** (e.g., *5th Annual Professional Development Institute: Current Issues Affecting Defense Financial Management*)
4. **Date(s)** attended or completed
5. **Number of CPEs earned**
6. **Evidence of attendance or completion**, such as:
 - University or college **grade report** for credit courses
 - Program **outline and attendance verification** from the sponsor
 - **Certificate or letter of completion** from the sponsor (e.g., PDI certificate)
 - **Copy of published work** (for authorship credit)

Tip: Keep records for at least **two years after recertification** in case of audit.