

# CREDENTIALALED MUNICIPAL FINANCE OFFICER APPLICATION



**Name:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Municipality:** \_\_\_\_\_

**FOR COMMITTEE USE ONLY:**

Education: \_\_\_\_\_

Experience: \_\_\_\_\_

Fee Paid: \_\_\_\_\_

Member of the NYSSMFO: \_\_\_\_\_

Number: \_\_\_\_\_

## About the Credentialed Municipal Finance Officer (“CMFO”) Program

The CMFO Program was established to acknowledge the educational and professional accomplishments of a Municipal Finance Officer. The program is designed to promote continuing education and training of Municipal Finance Officers, so as to enable them to serve their community with confidence, skill and professionalism, as well as to be informed of the ever-changing government finance issues and mandates.

Applicants must attain points for work in categories of experience and education, endorse the Code of Ethics for Municipal Finance Officers, and fulfill the credential requirements.

### Why become a Credentialed Municipal Finance Officer?

You should consider the ever-changing role of a Municipal Finance Officer, and how rapid changes in technology, financial reporting requirements, and government mandates-not to mention labor laws and post employment benefits-affect your ability to feel confident with your knowledge and performance to excel as a well-respected Municipal Finance Officer.

The key is to maintain a high degree of education and training.

This program is designed to do just that, without requiring a formal degree program, while acknowledging the accomplishment of a well trained and informed Municipal Finance Officer.

The Credentialed Municipal Finance Officer Program will assist you in understanding change, learning or enhancing skills, and reward you with confidence in performing your duties as a public official.

## **New York State Society of Municipal Finance Officers Code of Ethics**

### **Statement of Intent**

The Officers and Board of Directors of the New York State Society of Municipal Finance Officers (“NYSSMFO”) recognizes that there are rules and standards of ethical conduct for officers and members which, if observed, can enhance confidence in the society and promote our goals. It is for that purpose, the New York State Society of Municipal Finance Officers have adopted the following canons of ethical conduct for the officers and members of the Society.

#### **I. Personal Standards**

Municipal finance officers shall demonstrate and be dedicated to the highest ideals of honor, excellence, impartiality and integrity in all public and personal relationships to merit the respect, trust and confidence of governing officials, other public officials, employees, and of the public.

#### **II. Responsibility as Public Officials**

Municipal finance officers shall recognize and be accountable for their responsibilities as officials in the public sector striving for the highest quality of performance and counsel.

They shall exercise prudence and integrity in the management of funds in their custody and in all financial transactions.

#### **III. Development**

Municipal finance officers shall promote excellence in public service while maintaining their competence and

mentoring others.

**IV. Information Integrity**

Municipal finance officers shall demonstrate professional integrity in the issuance and management of information. They shall abide by all approved professional practices and standards. They shall respect the trust given them in accessing information and be sensitive and responsive to inquires for that information.

**V. Conflict of Interest**

Municipal finance officers shall actively avoid the appearance of or the fact of conflicting interests.

I, as a Municipal Finance Officer, pledge to serve by the Code of Ethics as here stated. I further do hereby apply for the Credentialed Municipal Finance Officer designation by the Credentials Committee and I hereby attest that the following statements and presentations are accurate and true to the best of my knowledge.

Signature: \_\_\_\_\_ Date \_\_\_\_\_

***PERSONAL DATA***

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Employer: \_\_\_\_\_

Address: \_\_\_\_\_

E-mail: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_

**REQUIREMENTS**

The applicant must meet the following requirements for certification:

1. Be employed by a municipality in finance or other official capacity (clerk, deputy/clerk, etc.)
2. Be a member of the NYSSMFO in good standing
3. Obtain a minimum of 50 Education points and 50 Experience points; and
4. Pay a non-refundable fee of \$50.00.

**POINTS**                      **MAXIMUM  
ALLOWED**

**I. EDUCATION POINTS**

A	Finance officer in-service education courses and seminars	1 per course hour	50
B	NYCOM/OSC Fall Training School*	1 per course hour	50
C	Bachelor's Degree in Finance, Public Administration or related** field	20	20
	Master's Degree in Finance, Public Administration or related field	18	18
	Bachelor's Degree in unrelated field	16	16
	Associates Degree in Finance, Public Administration or related field	16	16
	Associates Degree in unrelated field	14	14
	College courses	.5 per credit	
	Maximum College Credit Points Allowed	20	20

*\*MUST COMPLETE CMFO CREDIT FORM*

*\*\* INCLUDED, BUT ARE NOT LIMITED TO: RECORDS MANAGEMENT, POLITICAL SCIENCE, GOVERNMENT, BUSINESS ADMINISTRATION, ECONOMICS, FINANCE OR ONE OF THE SOCIAL SCIENCES.*

**EDUCATION POINTS - COLLEGE DEGREE**

Degree attained*	
College name	
Major	
Location	
Date received	
Copy of transcript or diploma attached.	
<b>ESTIMATED POINTS:</b>	
Degree attained*	
College name	
Major	
Location	
Date received	
Copy of transcript or diploma attached.	
<b>ESTIMATED POINTS:</b>	

*\*INCLUDE A COPY OF THE COLLEGE TRANSCRIPT AND/OR DIPLOMA SHOWING FIELD OF STUDY*

**EDUCATION POINTS**

**FINANCE OFFICERS IN SERVICE TRAINING AND NYCOM\***

**Section A**

**PLEASE ATTACH PROOF OF ATTENDANCE**

	Date	Training or workshop title	Sponsor	Hours	Estimated Points
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					

**TOTALS:** \_\_\_\_\_

\*Please attach official certifications for all training and the NYCOM Fall Training School credit form.

<b>II. EXPERIENCE POINTS - 50 REQUIRED</b>	<b>POINTS</b>	<b>MAXIMUM ALLOWED</b>
Experience as a full-time Municipal Finance Officer	10 per year	50
Experience as a full-time Deputy Municipal Finance Officer	8 per year	50
Experience as a part-time Municipal Finance Officer	8 per year	50
Experience as a part-time Deputy Municipal Finance Officer	8 per year	50
Other full-time position in local government	3 per year	15
Administrative position in federal or state government	2 per year	10
Administrative position in business	1 per year	5

**EXPERIENCE POINTS**

Position/title:
Employer:
Dates employed:
Responsibilities:
Full or part time:
Total years:
Estimated points:

Position/title:
Employer:
Dates employed:
Responsibilities:
Full or part time:
Total years:
Estimated points:

Position/title:
Employer:
Dates employed:
Responsibilities:
Full or part time:
Total years:
Estimated points:
<b>TOTAL EXPERIENCE POINTS:</b>

All CMFO designations shall expire following three (3) years from date of issuance. Recertification can be obtained upon completion of 20 hours of in-service education courses, completion of the recertification application and submission of a fee of \$20.00.

When completed please:

1. Scan the completed application with supporting documentation to [CMFO@nysmfo.com](mailto:CMFO@nysmfo.com)
2. Mail a check or voucher payable to NYSSMFO in the amount of \$50.00 to:

New York State Society of Municipal Finance Officers  
c/o Marianne C. Lobaccaro  
Village Administrator  
Village of North Hills  
One Shelter Rock Road  
North Hills, New York 11576-3130

For information contact the CMFO Committee:

Marianne C. Lobaccaro: 516-627-3451, [villageadministrator@villagenorthhills.com](mailto:villageadministrator@villagenorthhills.com)

Lisa Neary: [lneary@batavianewyork.com](mailto:lneary@batavianewyork.com)

Kristy O'Shaughnessy: [carthagect@westelcom.com](mailto:carthagect@westelcom.com)