



**Investment Recovery Association's  
Voluntary Certification Program  
Personal Data Form**

Investment Recovery Association • P.O. Box 419264  
Kansas City, Missouri 64141 • 816.561.5323

**CERTIFIED  
MANAGER OF  
INVESTMENT  
RECOVERY**

**Code of Ethics**

In order to promote and maintain the highest standards of personal standards and conduct, the Investment Recovery Association has adopted a Code of Ethics for persons attaining the CMIR (Certified Manager of Investment Recovery) certification.

Adherence to these standards is required for certification, and serves to assure public confidence in the integrity and professionalism of investment recovery department personnel.

**As a CMIR, I pledge to:**

1. Maintain the highest standard of personal conduct.
2. Promote and encourage the highest level of ethics within the industry or profession my company represents.
3. Maintain loyalty to the company that employs me, and pursue its objectives in ways that are consistent with the public interest.
4. Recognize and discharge my responsibility to uphold the laws and regulations relating to my company's policies and activities.
5. Strive for excellence in all aspects of investment recovery management.
6. Use only legal and ethical means in all investment recovery activities.
7. Serve all members of my company impartially, provide no special privilege to any individual and accept no personal compensation from a supplier of services.
8. Maintain the confidentiality of privileged information entrusted or known to me by virtue of my position.
9. Refuse to engage in or countenance, activities for personal gain at the expense of my company, our industry or my profession.
10. Always communicate internal and external statements in a truthful and accurate manner.
11. Cooperate in every reasonable and proper way with other investment recovery professionals and work with them in the advancement of the profession of investment recovery.
12. Use every opportunity to improve public understanding of the role of investment recovery.



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## **A Professional's Recognition in Investment Recovery Management**

When you apply for the Certified Manager of Investment Recovery designation, you are on your way to demonstrating that you are among the best.

You'll join a select group of men and women who have made the commitment to excellence in investment recovery and an ongoing pursuit of knowledge... and you will be amply recognized in the process.

Established in 1994, the CMIR program was designed not only to further elevate professional standards and evaluate individual performance, but also to recognize and distinguish those who have reached one of the highest levels of achievement in investment recovery.

## **The CMIR: A Recognized Success Path**

Among investment recovery professionals, the CMIR is structured to become known and appreciated. Not only is it the mark of distinction throughout the profession, but it offers you a wide range of important benefits:

### **• Expanded Knowledge**

By reading, studying and preparing for the exam, you'll gain a thorough, up-to-date understanding of every aspect of investment recovery, including a look at future trends and strategies essential to your success.

### **• Extensive Peer Communication**

As a CMIR candidate, you'll have a networking opportunity as a result of the course of study, and will benefit from ongoing dialogue with fellow CMIR candidates.

### **• Heightened Professional Recognition**

A symbol of leadership and accomplishment, the CMIR designation is highly regarded by peers, purchasing professionals and your management team.

Completion of the CMIR program may well place you on the "Fast Track" to professional achievement.

## **CMIR Eligibility Requirements**

You should definitely make CMIR certification your immediate goal if:

- You are currently employed as an investment recovery department manager, supervisor or provide support within an investment recovery department with three (3) or more years of experience.
- Acceptable character, ability and reputation.
- You pledge in writing to adhere to the Investment Recovery Association Code of Ethics.
- Develop 35 points from your Personal Data Form (PDF).
- Successfully pass the required exam.

Now is the time to learn about the CMIR Program and plan your strategy for attaining this prestigious designation.

## **CMIR Examination Schedule and Dates**

The exam is multiple choice and is scheduled for two and a half hours. The exam will be offered at the Association Conference.

## **Ways to Prepare For the Exam**

The *Investment Recovery Handbook: Adding Value to the Supply Chain* is available to use as a review. This publication is available from the website, [www.invrecovery.org](http://www.invrecovery.org) or Amazon.com.

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## **Personal Data Form (PDF) Instructions**

This form provides an organized method of documenting your professional and educational background achievements and involvement in Association activities.

A scoring guide for personal data is included in the right margin of the form for information in totaling your score. Also note that there are maximum allowable scores for five of the PDF divisions.

Thirty-five points are required in order to qualify to sit for the CMIR exam. It is prudent to include all the points you can in each of the divisions against the possibility of variations in your own evaluation and those of the Commission.

Generally, you can estimate that you may need approximately three to five years investment recovery experience to accumulate 35 points.

PDFs will be evaluated throughout the year. However, your PDF must be postmarked no later than 45 days before the opening day of each Conference to sit for the exam given at that Conference. Email is acceptable. Once your Personal Data Form is submitted and accepted, you are eligible to begin sitting for the exam. You must develop 35 points from your Personal Data Form to be eligible to sit for the exam.

## **Fees**

### *Application Fee*

A fee of \$500 (members), \$650 (non-members) is payable with the filing of the application. Costs break down as follows.

#### **Members:**

PDF Fee: \$300.00; Exam Fee: \$200.00

#### **Non-Members:**

PDF Fee: \$400.00; Exam Fee: \$250.00

### *Re-Examination Fee*

For each re-examination, a fee in the amount equal to 50% of the exam fee will be required

## **Hints for Completing the PDF**

- Candidates should read very carefully the point descriptions in each of the divisions of the form.
- Include materials requested to verify information given.
- Complete the application in full.

## **Instructions for Resubmitting a PDF**

If you do not obtain the 35 points, you may resubmit an updated PDF. Use the Personal Data Form to document the activities and achievements you have accomplished since you submitted the first PDF. There is no need to document the information you included in the first PDF. Scores are kept for three years.

## **The CMIR Designation**

Candidates are notified of their status by the Investment Recovery Association staff. Successful candidates are invited to attend the next Investment Recovery Association Conference and Trade Show to be recognized (during the business meeting) where they are awarded their CMIR plaque.

The Association will also notify your firm's management team of your outstanding accomplishment.

## **How CMIR's Recertify**

To maintain certification, a designee must accumulate professional credits and submit a completed Recertification Form four years after the original date of certification. Following that date, recertification is required every five years. Each CMIR reaches the first recertification date on the fourth January 1st following the date appearing on the certificate attesting to the certification.

### *Recertification Fee*

A fee of \$50 (member), \$100 (non-member) for each five year recertification filing to maintain the designation.

Recertification form will be available on the website.

# Certified Manager of Investment Recovery (CMIR) Application

*Make professional excellence your goal today!*

## CMIR CERTIFICATION COMMISSION

Investment Recovery Association

P.O. Box 419264

Kansas City, Missouri 64141

816.561.5323 • Fax: 816.561.1991

jmale@swassn.com

Please print clearly

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

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

Company: \_\_\_\_\_

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

City: \_\_\_\_\_ State \_\_\_\_\_ Zip + 4: \_\_\_\_\_

Phone: \_\_\_\_\_ email address: \_\_\_\_\_

Direct Supervisor: \_\_\_\_\_ email address: \_\_\_\_\_

Indicate the investment recovery position(s) you have held in the past three (3) years:

Present Position: \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

*(List full title)*

Duties: \_\_\_\_\_

Previous Company name and Position \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

*(List full title)*

Duties: \_\_\_\_\_

Previous Company name and Position \_\_\_\_\_ From: \_\_\_\_\_ To: \_\_\_\_\_

*(List full title)*

Duties: \_\_\_\_\_

**FEES:** ALL FEES MUST ACCOMPANY APPLICATION. Application fee is \$500 (Member), \$650 (Non-Member). Send completed application with Personal Data Form and appropriate fee to the Association's Headquarters.

My check is enclosed in the amount of \$ \_\_\_\_\_

Charge My:    AMEX            Visa            MasterCard            In the amount of: \$ \_\_\_\_\_

Account No: \_\_\_\_\_ Expiration Date: \_\_\_\_\_

Signature: \_\_\_\_\_ Sec. Code: \_\_\_\_\_

Printed Name on Card: \_\_\_\_\_

### Prerequisites for Application

- Employment full time (50% or more) in an investment recovery position with 3 years or more experience.
- Acceptable character, ability and reputation.
- Pledge in writing to adhere to the Investment Recovery Association Code of Ethics.

In making this application, I fully understand that in order to complete registration it will be necessary to complete a Personal Data Form with the necessary documents plus submit to the written examinations. I further understand and, by my signature, **I subscribe to the Investment Recovery Association Code of Ethics** with the knowledge that any false statement or misrepresentation may result in the revocation of this application and the issuance of a complaint of violation on said Standards.

Applicant's Own Signature: \_\_\_\_\_

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



## DIVISION II - SPECIFIC COLLEGE CREDIT COURSES

(Maximum: If Degree Claimed in Division I...4 points; If No Degree Claimed .. 8 points)

[ ] Check here if supplement material is attached for Division II. Be sure that material is labeled to indicate each item number and is located in the back of the PDF.

11. This section for courses not included for degree claimed in Division I. This includes courses taken at degree institutions only and must be taken after date of degree, if degree claimed. Submit proof of courses.

INSTITUTIONS	DATES	DEGREES AND MAJOR	Guide:	Maximum Allowable:
			<i>Each 3-Credit hour in: Accounting, Business Administration, Economics, Engineering, Finance, Supply Chain, Industrial or Material Management, Law, Marketing or Purchasing</i>	<i>3 points each</i>
			<i>Other 3-Credit hour courses</i>	<i>1 point each</i>

## DIVISION III - SEMINAR & CONTINUING EDUCATION COURSES

(Maximum: 15 points for Division III)

SEMINAR/PROGRAM HOST	DATES	COURSE TITLE/LOCATION	Guide:	Maximum Allowable:
			<i>Investment Recovery Association conference</i>	<i>5 points each</i>
			<i>Any supply chain related seminar and continuing education session</i>	<i>3 points each</i>
			<i>Investment Recovery Online Campus Module</i>	<i>2 points each</i>

## DIVISION IV - EXPERIENCE

(Maximum: Ten years experience, not to exceed 25 points)

POSITION TITLE	DATES SERVED	COMPANY NAME	Guide:	Maximum Allowable:
			<i>Class 1 Manager associated with investment recovery activities</i>	<i>5 points per year</i>
			<i>Class 2 Supervisor or Specialist associated with investment recovery activities</i>	<i>3 points per year</i>
			<i>Class 3 Employees in support of investment recovery activities</i>	<i>1 point per year</i>

**DIVISION V - OTHER INDUSTRY CERTIFICATIONS**

*(Maximum allowed: 4 points)*

**Guide:** **Maximum Allowable:**

*Please list industry certifications earned for a maximum of 4 points*

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**DIVISION VI - CONTRIBUTION TO THE INVESTMENT RECOVERY ASSOCIATION OR THE INVESTMENT RECOVERY PROFESSION**

*(Unlimited contribution allowed)*

**Guide:** **Maximum Allowable:**

*Officer, Director or Chairman of any standing committees of the Investment Recovery Association  
5 points yearly*

**AREA OF CONTRIBUTION**

**DATES**

*Investment Recovery Association active standing committee member  
2 points yearly*

*Investment Recovery Association presentation development  
3 points per presentation*

*Investment Recovery Association presenter (uncompensated)  
10 points per event*

*Published articles - must be substantive, well developed and research based. Articles published in an established trade magazine or Investment Recovery Association publication  
5 points each*

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**DIVISION VII - ADDITIONAL INFORMATION**

**INCLUDE ANY OTHER INFORMATION THAT YOU FEEL SHOULD BE CONSIDERED WHEN EVALUATING YOUR APPLICATION.**

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