

Appendix D: Matrix of Current Counselors

OMB No. 1105-0084

(Application for Approval as a Nonprofit Budget and Credit Counseling Agency) Approval Expires 09/30/2025

| | | | | | | | | | | |
|--|------------------------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|-----------|--|
| Name of Agency: Other business names used at this location, if any: Street address: | | | | | | | | | | |
| Total number of personnel at this location: _____ | Counselor Names | | | | | | | | | |
| | 1. | 2. | 3. | 4. | 5. | 6. | 7. | 8. | 9. | 10. <small>(Copy this page for additional employees)</small> |
| Supervisor (check) | | | | | | | | | | |
| EDUCATION - Highest Degree Received (check one) | | | | | | | | | | |
| High School | | | | | | | | | | |
| A.D. | | | | | | | | | | |
| B.A./B.S. | | | | | | | | | | |
| Graduate (M.S., J.D., Ph.D.) | | | | | | | | | | |
| Other (specify)* | | | | | | | | | | |
| COUNSELOR CERTIFICATION (check all that apply) | | | | | | | | | | |
| Certified by Independent Organization* | | | | | | | | | | |
| Course of Study* | | | | | | | | | | |
| CFP | | | | | | | | | | |
| RFC | | | | | | | | | | |
| CPA | | | | | | | | | | |
| EXPERIENCE (state years of experience) | | | | | | | | | | |
| Credit Counseling | | | | | | | | | | |
| Financial Management - Financial Planning | | | | | | | | | | |
| Consumer Credit Education | | | | | | | | | | |
| Consumer Economics | | | | | | | | | | |
| Other (specify)* | | | | | | | | | | |
| BACKGROUND CHECK (state the year of the criminal background check and check if no conviction for any felony, or crime involving fraud, dishonesty, or false statements) | | | | | | | | | | |
| Criminal Check (Year) | | | | | | | | | | |
| No Criminal Conviction | | | | | | | | | | |
| ANNUAL CONTINUING EDUCATION | | | | | | | | | | |
| State year of most recent completion of continuing education course. | | | | | | | | | | |

* Disclose on separate page. See Section 8, Appendix D, of Instructions for additional detail.