

Documentation of Eligibility for PDMM® Pre-certification Hours -- **EXAMPLE**

In addition to the PDMM® Certification application, applicants are required to include a separate attachment, with written explanation of the work performed that satisfies the requirement for paid and pro bono/volunteer work experience to substantiate the claim. The types of tasks that qualify for pre-certification hours are outlined in the *Examination Content Outline* at https://secure.aadmm.com/wp-content/uploads/2019/03/PDMM_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 2013 – present)

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)

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 – 10 hours per month from

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

Client Z – 20 hours per month from (date range) Duties Performed:

- Bill Paying
- Opening/sorting mail
- Established Filing system for current work
- Monthly Bank Reconciliation
- Work with tax preparer
- Utilize online bill pay services
- Handle payroll for household staff

Total paid hours = 1608 hours