

CDFI CERTIFICATION ASSESSMENT AND APPLICATION ASSISTANCE

Purpose: The requirements to meet CDFI Certification are complicated and can be difficult to understand. With a revised certification application slated to be released in October 2023, both the policies and the process around certification are changing – and all existing CDFIs will have to recertify to show that they meet the new criteria. Whether you are an emerging or established CDFI, we've designed a process to demystify and guide your organization through the certification or recertification process. *For more information on the new Certification application, watch our [video](#) that explains the major proposed revisions.*

Process: Our two phase process starts with an assessment designed to decisively assure that your organization meets the seven revised tests. During the assessment, your team will upload required documents and complete a few simple worksheets with the information we need to complete the assessment.

Then we deliver your report card, a thorough report indicating which tests you meet and which still need work. If you don't meet any of the criteria, no worries! We provide clear guidance on how to meet the test. We also provide you with templates for new policies that are now required by the CDFI Fund.

Bonus! You also get a copy of [myFund](#), our proprietary workbook you can use to help prepare the application.

Options: You can choose to engage our team for one or both phases of the process.

- 1) ASSESSMENT ONLY** - For this option, F|A conducts the assessment and you use our proprietary [myFund](#) workbook to prepare the certification application.
- 2) ASSESSMENT AND FULL APPLICATION ASSISTANCE** - F|A has successfully prepared certification applications for over 15 years. We'll get to work on your application and ensure a smooth and successful submission!

If you are interested in learning more about becoming certified as a CDFI, please [complete this brief survey](#). We'll reach out to you after we review to schedule a time to talk.