



Creating Board Records for Credit Unions in AMIS

Office of Certification Policy and Evaluation (OCPE)

COMMUNITY DEVELOPMENT FINANCIAL INSTITUTIONS FUND

www.cdfifund.gov

Resources



- Full guidance on Organization Board Records found under Step 2: Apply at www.cdfifund.gov/cdficert.

Use of Board Records



- An Applicant or Certified CDFI can create up to 2 board records to demonstrate accountability to its proposed CDFI Certification markets.
- CDFI Certification Market Records are used to demonstrate compliance for
 - Entities seeking to obtain or maintain CDFI Certification
 - Entities seeking to obtain or maintain the Native American CDFI designation
 - Entities relevant to the CDFI Certification collective review

Presentation Structure



Creating a New Board Record for Credit Union Applicants



Creating Board Member Records



Changing Board Status for Submission

Presentation Structure

A yellow graphic element consisting of a curved line that passes through two thin yellow circles, one above and one below a central solid yellow circle.

Creating a New Board Record for Credit Union Applicants

Creating Board Member Records

Changing Board Status for Submission

Presentation Structure

A yellow graphic element consisting of a curved line that starts at the top left, passes through two empty circles, and ends at a solid yellow circle at the bottom left.

Creating a New Board Record for Credit Union Applicants

Creating Board Member Records

Changing Board Status for Submission