



2022

ANNUAL REPORT

| | 2022 | 2021 | 2020 | 2019 | 2018 |
|---------------------------------|-------|-------|-------|---------|-------|
| Active CDFA[®]s | 3,371 | 3,063 | 2,777 | 2,763 | 2,501 |
| New CDFA[®]s | 291 | 306 | 279 | 919 | 811 |
| Renewal Rate | 67.0% | 67.0% | 66.0% | 66.0% | 68.0% |
| Exam Pass Rate | 63.0% | 71.0% | 74.7% | 73.5%** | 78.0% |

** IDFA introduced a new consolidated exam in 2019 and is now reporting the pass rates for the updated exam.

BOARD OF ADVISORS

2023

David Smith (Chair)
Karen D. Sparks
Denise French
Alyssa Feldmeyer Miller
Nancy Hetrick
Andrew Hatherley

2022

Jane McAuliffe (Chair)
Jacki Roessler
Karen D. Sparks
David Smith
Denise French
Alyssa Feldmeyer Miller
Dr. Mary Martin

2021

Donna Cheswick (Chair)
Ben Feldmeyer
Jane McAuliffe
Jacki Rosessler
Mary Martin
Karen Sparks
David Smith

2020

Donna Cheswick (Chair)
Ben Feldmeyer
Rebecca Griffin
Jane McAuliffe
Jacki Roessler
Mary Martin
Peggy Tracy

2019

Sandi Gumeson (Chair)
Kevin Ruth
Cate Henry
Donna Cheswick
Peggy Tracy
Ben Feldmeyer
Rebecca Griffin

2018

Diane Pappas (Chair)
Matthew Lattig
Donna Cheswick
Peggy Tracy
Sandi Gumeson
Cate Henry
Kevin Ruth

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DISCIPLINARY ACTIONS

| | Number of Complaints | Disciplinary Action |
|-------------|----------------------|---|
| 2022 | 0 | <ul style="list-style-type: none"> • Not applicable |
| 2021 | 3 | <ul style="list-style-type: none"> • Public censure (1) • Complaint dismissed (2) |
| 2020 | 5 | <ul style="list-style-type: none"> • Administrative suspension (1) • Public censure (1) • Unauthorized use of the certification marks (3) • Complaint dismissed (1) |
| 2019 | 2 | <ul style="list-style-type: none"> • Indefinite suspension pending investigation (1) • Complaint dismissed (1) |
| 2018 | 4 | <ul style="list-style-type: none"> • Suspension pending investigation (1) • Letter of admonition (1) • Complaint dismissed (2) |

2022 CDFA® PROFESSIONAL DEMOGRAPHICS

