



# 2021

## ANNUAL REPORT

|                       | 2021  | 2020  | 2019    | 2018  | 2017  |
|-----------------------|-------|-------|---------|-------|-------|
| <b>Active CDFA®s</b>  | 3,063 | 2,777 | 2,763   | 2,501 | 2,322 |
| <b>New CDFA®s</b>     | 306   | 279   | 919     | 811   | 734   |
| <b>Renewal Rate</b>   | 67.0% | 66.0% | 66.0%   | 68.0% | 86.0% |
| <b>Exam Pass Rate</b> | 71.0% | 74.7% | 73.5%** | 78.0% | 83.0% |

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

### BOARD OF ADVISORS

#### 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

#### 2017

Russell Luna (Chair)  
Faisal Karmali  
Diane Pappas  
Matthew Lattig  
Sandi Gumeson  
Cate Henry

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## DISCIPLINARY ACTIONS

|             | Number of Complaints | Disciplinary Action                                                                                                                                                                                           |
|-------------|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>2021</b> | <b>3</b>             | <ul style="list-style-type: none"> <li>• Public censure (1)</li> <li>• Complaint dismissed (2)</li> </ul>                                                                                                     |
| <b>2020</b> | <b>5</b>             | <ul style="list-style-type: none"> <li>• Administrative suspension (1)</li> <li>• Public censure (1)</li> <li>• Unauthorized use of the certification marks (3)</li> <li>• Complaint dismissed (1)</li> </ul> |
| <b>2019</b> | <b>2</b>             | <ul style="list-style-type: none"> <li>• Indefinite suspension pending investigation (1)</li> <li>• Complaint dismissed (1)</li> </ul>                                                                        |
| <b>2018</b> | <b>4</b>             | <ul style="list-style-type: none"> <li>• Suspension pending investigation (1)</li> <li>• Letter of admonition (1)</li> <li>• Complaint dismissed (2)</li> </ul>                                               |
| <b>2017</b> | <b>2</b>             | <ul style="list-style-type: none"> <li>• Suspension (1)</li> <li>• Revocation (1)</li> </ul>                                                                                                                  |

## 2021 CDFA® PROFESSIONAL DEMOGRAPHICS

