## 2022 ANNUAL REPORT

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>2021</th>
<th>2020</th>
<th>2019</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active CDFA’s</strong></td>
<td>3,371</td>
<td>3,063</td>
<td>2,777</td>
<td>2,763</td>
<td>2,501</td>
</tr>
<tr>
<td><strong>New CDFA’s</strong></td>
<td>291</td>
<td>306</td>
<td>279</td>
<td>919</td>
<td>811</td>
</tr>
<tr>
<td><strong>Renewal Rate</strong></td>
<td>67.0%</td>
<td>67.0%</td>
<td>66.0%</td>
<td>66.0%</td>
<td>68.0%</td>
</tr>
<tr>
<td><strong>Exam Pass Rate</strong></td>
<td>63.0%</td>
<td>71.0%</td>
<td>74.7%</td>
<td>73.5%**</td>
<td>78.0%</td>
</tr>
</tbody>
</table>

**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
### DISCIPLINARY ACTIONS

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of Complaints</th>
<th>Disciplinary Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022</td>
<td>0</td>
<td>Not applicable</td>
</tr>
<tr>
<td>2021</td>
<td>3</td>
<td>Public censure (1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complaint dismissed (2)</td>
</tr>
<tr>
<td>2020</td>
<td>5</td>
<td>Administrative suspension (1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Public censure (1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Unauthorized use of the certification marks (3)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complaint dismissed (1)</td>
</tr>
<tr>
<td>2019</td>
<td>2</td>
<td>Indefinite suspension pending investigation (1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complaint dismissed (1)</td>
</tr>
<tr>
<td>2018</td>
<td>4</td>
<td>Suspension pending investigation (1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Letter of admonition (1)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complaint dismissed (2)</td>
</tr>
</tbody>
</table>

#### 2022 CDFA® PROFESSIONAL DEMOGRAPHICS

**Gender**
- Female: 61.6%
- Male: 33.9%
- Gender Variant: 4.5%

**Age**
- < 21: 0.8%
- 21-29: 8.9%
- 30-39: 23.5%
- 40-49: 21.1%
- 50-59: 24.3%
- 60+: 21.4%

(Figures for gender and age distribution are shown in pie charts.)