

CDB Final Steps

Congratulations on passing the Certified Digital Bookkeeper exam. I know that that was a lot of work for you and you actually earned it. And I'm proud to welcome you here to the final steps. You're almost to the end. And so, let's walk through exactly what you need to do to earn the Certified Digital Bookkeeper. Remember, there's the one, two, three. We've got to have the one year of experience. You've got to have the two or more clients. And then the three letters of recommendation. Two of those have to be from clients and then another one that has to be from a professional. This is going to be a CPA, an attorney, and EA, a former employer, or from another client that you have right there. So, the three letters of recommendation. The signed DBA, code of ethics, very important that we do that and be a member in good standing. And then the proof of E&O insurance of at least a coverage of \$500,000.

So, let's get very granular about that, what you need to do. First and foremost, download the client letter of recommendation document that's below and send this to those two clients that you're going to get a letter of recommendation for. We've made this pretty darn simple for you. And again, that template is right below this video. Also download the professional letter of recommendation if it's going to be somebody other than your client. Again, there's a template that's right below this video and you need to get that filled out and signed by them, if it's a professional or your client. You need to review the code of ethics document and then sign the signature page. Very important. This is a very extensive document. So, make sure that you check it out and then find the page of your errors and omissions insurance, which shows your coverage. We've given you an example down below so that you can see exactly what we are talking about, because we want to make sure that we're getting the right documents and that we're going through the proof.

And then gather all that information because you can't submit this piecemeal. You're going to gather all that information and once you have it complete, once you have the client letters filled out and signed, you have the professional letter, it's signed, you have your errors and omissions insurance, you've signed that code of ethics and printed it off, all of that information, then you're going to submit the CDB application. And there is a link down below. You've got a little bit more work to do. This is going to be awesome. We're going to be able to congratulate you real soon and here's what's going to happen. As soon as you submit that application, you are done, unless there's anything that's missing in there. We're going to check it and all that, but you should be done as long as you submit everything as we talked about before.

The application board is going to review your application within 30 days. So, I know that's kind of a long time, but they meet once a month. So, the application board is going to review your application. You're going to receive an email notification when the review is complete. Hopefully it'll say, "Yay, congratulations. You're a certified digital bookkeeper." If there's any additional information that's needed, we will let you know that as well. And then now you get to go and celebrate because you are going to be able to put this on your wall. You're going to be able to put this on your site, wherever. And we are going to be able to congratulate you as a

Certified Digital Bookkeeper. So, you are again at the very end of the road and I'm proud of you. And I can't wait to welcome you into the sister and brotherhood of the Certified Digital Bookkeeper.