

# CERTIFIED BUSINESS INTERMEDIARY (CBI)

## FAST TRACK PROGRAM

Tenured Business Brokers can earn the prestigious CBI designation without completing the basic education typically required!

### CBI Fast Track Program Requirements



1. Be or become an IBBA member in good standing (IBBA Membership must be secured before application submission).
2. Pay a one-time, non-refundable \$1,495.00 USD application fee.
3. Complete the Fast-Track application (next page).
4. Register and attend the 4-hour virtual refresher course (register at [IBBAUniversity.org](https://www.ibba.org)). Once your application is approved, you will be sent a code to register for the refresher course.
5. Take and pass the 3-hour CBI exam (a minimum 70% score on each section required). Contact [education@ibba.org](mailto:education@ibba.org) to schedule your exam. You will be eligible to take the exam after attending the refresher course.
6. Register and attend an IBBA Conference (separate registration required).
7. Provide ONE of the following:
  - Document 10 years of full-time deal making experience (not required to be continuous).
  - Closing Documents showing proof of (7) transactions as lead selling broker in the past 3 years.
  - Closing Documents showing proof of transactions in the past 2 years with a cumulative value of \$1,500,000 or more excluding real-estate.

To show proof of transactions, you must use the CBI Transaction Submittal form found on the website (<https://www.ibba.org/cbi-certification/cbi-forms/>).

Complete ONE of the following:

- Two IBBA member recommendations, or one IBBA or IABA Board Member recommendation.
  - Active participation on an IBBA committee for a minimum of one (1) term.
8. Provide a complete resume or CV.

Your application and ancillary materials will be reviewed by the Credentialing Committee. The decision to approve your application will be made at the sole discretion of the IBBA. **All materials must be sent in a one document PDF or it will not be accepted.**

### Additional Information

- M&A Source membership cannot be substituted for CBI Fast Track applicants.
- After receiving the designation, you must maintain IBBA membership and remit annual CBI maintenance fees.
- To maintain the CBI designation, you must meet the recertification requirements every 3 years as outlined in the [CBI Policy](#).

# CBI FAST TRACK PROGRAM APPLICATION

Submit this form to [education@ibba.org](mailto:education@ibba.org) to be considered for the CBI Fast Track program.

## PERSONAL INFORMATION:

FIRST: \_\_\_\_\_ MI: \_\_\_\_\_ LAST: \_\_\_\_\_

I HAVE AN ACTIVE IBBA MEMBERSHIP.

COMPANY: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

CITY: \_\_\_\_\_ STATE/PROVINCE: \_\_\_\_\_ ZIP/MAIL CODE: \_\_\_\_\_ COUNTRY: \_\_\_\_\_

PHONE: \_\_\_\_\_ FAX: \_\_\_\_\_

EMAIL: \_\_\_\_\_

Please check the requirements you are submitting:

- Proof of ten years of full-time deal making experience.
- Proof of seven transactions as lead selling broker in the past three years.
- Proof of transactions in the past two years equal to \$1,500,000 or more excluding real-estate.  
To show proof of transactions, please visit the IBBA website at <https://www.ibba.org/cbi-certification/cbi-forms/> and submit the CBI Transaction Submittal form.

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- Two IBBA member recommendation or one IBBA or IABA Board member recommendation.
- Active participation on an IBBA committee for a minimum of one term.

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- I am NOT currently involved in nor have been convicted of a criminal or ethical violation in the past. If you have a current or historical criminal or ethical violation, please provide written explanation:

\_\_\_\_\_

\_\_\_\_\_

Submit additional piece of paper if necessary.

## PAYMENT INFORMATION:

You will be invoiced through your account at [myibba.org](http://myibba.org) upon submittal of this application.

## ACKNOWLEDGEMENT AND AUTHORIZATION

I have read and understand the requirements of the CBI Fast Track Program including, but not limited to the IBBA Conference attendance requirement and the provision that my \$1,495.00 USD application fee is non-refundable once processed.

SIGNATURE OF APPLICANT: \_\_\_\_\_ DATE: \_\_\_\_\_

*(By your signature, you accept receipt of all email communication and confirmation from the IBBA.)*

Direct all questions to (888) 686-4222. Once you submit this application, please allow up to 14 business days for notification of status.