



Print and review Accreditation Forms 1001-1007, located on the Accreditation page of the AMC Institute (AMCI) website.

Submit Form 1001, indicating your AMC's interest in pursuing new AMCI Accreditation.

Prepare policies and documentation according to the ANSI Standards. Apply processes and procedures within your AMC.

After policies have been established and all documentation compiled, select a qualified CPA to conduct your AMC's review.

Give the CPA/reviewer AMCI's reviewer materials (reviewer forms, webinar training, and guide).

Reviewers Commitment (Form 1005) is submitted to AMCI, completed and signed by reviewer. Reviewer must be approved by AMCI before review is conducted.

AMCI will notify you within seven working days of receipt of Form 1005 and supporting documentation from reviewer if your reviewer has been approved.

Participate in Accreditation Workshop & Study Groups

Staff Introduction and incorporation of AMCI Accreditation & Standards within your AMC

Not Approved

Approved

Submit the following to AMCI:

- Declaration of Intent to Become AMCI Accredited (Form 1002)
- License Agreement (Form 1003)
- Accreditation Fee (Form 1006) and Initial Accreditation Fee Payment
- Procedures for Alleged Violations and Statement of Solvency (Form 1007)

Confirm the terms and conditions of your AMC's review directly with your CPA/reviewer. Related expenses are to be negotiated by you and are your AMC's responsibility.

Schedule the review. Ideally, the review should be completed within six (6) months of submitting Form 1002 and within 30 days of AMCI's approval of your firm's selected CPA/reviewer.

Upon AMCI Accreditation review completion, the reviewer will then forward the Reviewer's Report (Form 1004) to AMCI for verification and AMCI processing of all forms submitted by AMC, including Reviewer's Report.

Review Incomplete

Review Passed

AMC shall respond in writing directly to the reviewer with explanation and supporting information that addresses the area(s) of concern or shall withdraw its application for AMCI Accreditation without prejudice. All monies and fees submitted shall be considered payment for services rendered to date.

AMC receives congratulatory confirmation, AMCI Accredited AMC logos, and certificate in electronic and hard copy formats from AMCI.