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**Candidate Application for CFANY Board of Directors**

**Submission deadline is November 15, 2017**.

**1) Name of Applicant:**

**2) Membership Status (Regular, Professional, CFA Candidate):**

**3) Position for which you wish to be considered:**

**4) Please tell us about yourself:**

Name Middle Last Name

Street Address

City

State

Zip Code

Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Daytime Mobile/Other

E-mail Address:

I live and work in the tri-state area: \_\_\_ \_\_ Yes \_\_\_\_\_\_ No

Number of days per year spent in the tri-state area (365 - annual travel days): \_\_\_\_\_\_\_\_\_\_

General ad hoc availability to meet in person or on the phone as matters may arise: \_\_ \_\_\_ Yes \_\_\_\_\_\_ No

**Please take as much space as you would like to answer the following questions:**

**5) Please tell us about your history of involvement with CFANY:**

I have been a CFANY member for **\_\_\_\_\_\_\_** years and a Regular Member of CFANY (this means CFA charterholder) for \_\_\_\_\_\_\_ years.

I have been a Regular Member (CFA charterholder) of CFANY continuously since \_\_\_\_

(year).

Indicate name(s) of other CFA Societies besides CFANY of which you have been a Regular Member and the continuous years of Regular Membership:

**6) List your CFANY experience, including leadership positions, with the year(s) served in each position** (i.e., Global Investing Committee, Chair, 2011-2013; Vice Chair, 2009-2011; Socially Responsible Investing, member, 2007-2011, etc.).

**7) Current/Most Recent Employer (Include any information you feel necessary to describe your firm and your role):**

Industry:

Specialization:

Size of firm (number of employees):

Would your firm be supportive of your service on the CFANY Board?

Your title and basic job responsibilities:

**8) Do you have experience serving on a board, particularly a non-profit board? If yes, please detail your experience. (bullet format can work well here)**

**9) \*Personal Statement: What inspires you to want to become a Director of CFANY? What do you most hope to accomplish? (500-1000 characters including spaces)**

**10) \*Experience/Qualifications Relevant for Candidacy: Please describe your relevant experience for the role for which you are applying. (500-1500 characters including spaces)**

**11) What do you consider to be the most important strength you will bring to the Board? How do you plan to contribute? (500-1500 characters including spaces)**

**12) Please attach at least two letters of reference (ideally, one from a current employer or client, if currently employed/consulting, and one from a CFANY Regular Member) as well as a current CV, not to exceed 2 pages.**

**\*Note: Personal Statement and Experience/Qualifications of successful candidates as drafted on the application will be included on the ballot sent to all members.Applicant Certification**

I am a Member in good standing of CFANY. I have completed this application and the attached documents, and all of the information contained in this application and the attached documents is true. I have read the job description of the position for which I am applying. I understand what my duties and role would be and, if selected as a candidate for the role and approved by the membership of CFANY, I am willing to make the commitment of time and energy required for service on the CFANY Board of Directors.

I understand that it is the expectation of CFANY that people who accept leadership positions on the CFANY Board of Directors recognize that leadership entails:

* mentoring and supporting other members
* working cooperatively and in good faith with all other CFANY constituents, including members of the Board of Directors, committee leaders, members, and staff
* being and remaining in good financial standing at CFANY
* meeting the Board of Directors basic criteria, including attendance at meetings, participation on at least one board committee, and signing the governance forms

In consideration of, and as a condition of, being considered by CFANY as a nominee for election to the Board of Directors, the applicant, by signing this application, does hereby expressly represent and agree that he or she will comply with all applicable law, rules and regulations and the policies of CFANY, will maintain CFANY’s nonpublic information as confidential, will observe and discharge all duties of a director of CFANY in good faith (if nominated and elected) and will not commence any lawsuit or proceeding against CFANY related to or arising out of the nomination and/or election processes.

Signature:

I, , am submitting my application via e-mail. The checked box constitutes my signature affirming the information in the Applicant Certification above.

Date:

NOTE: If you are submitting your application via e-mail ([nominates@cfany.org](mailto:nominates@cfany.org)), you must check the box above, which will be the equivalent of signing the Applicant Certification.