**Membership Prequalification & Nomination Form**

**Nominee’s Name:**

**Nomination Process and Instructions for Sponsor**

To ensure your nominated candidate qualifies for consideration, please refer to the CFE Nomination process and Membership Guidelines in the Membership pull-down menu of the CFE website.

**Requirements and Documents needed for Pre-Qualifications:**

* Completed prequalification & nomination form: *Completed by the sponsor – not candidate.*
* Current resume and/or detailed bio

Send all docs to [admin@chicagofinanceexchange.org](mailto:admin@chicagofinanceexchange.org). Once these documents are received, they are reviewed by the Membership Committee. Sponsors will be notified by the Membership Committee of prequalification status.

**Requirements and Documents needed for Board Approval:**

Once the candidate is prequalified, the sponsor should complete the remainder of the nomination packet:

* Formal letter of sponsorship (by sponsor)
* A seconding letter from another CFE member.
  + *In cases where the sponsor, candidate and seconding member are not from three different companies/organizations, TWO members must second the nomination with each member providing a letter of support.*
* A candidate must have attended at least one CFE dinner program, or an approved event/meeting.
* Send all docs to [admin@chicagofinanceexchange.org](mailto:admin@chicagofinanceexchange.org).
* Once these documents are received and the candidate has attended a dinner, they are reviewed by the Membership Committee and the Board for approval.
* Sponsors will be notified by the Membership Committee of approval.

**This prequalification and nomination form must be completed by the CFE sponsor (not the candidate).**

|  |  |
| --- | --- |
| First Name |  |
| Last Name |  |
| Company/Organization |  |
| Title |  |
| Company Address (City/State/Zip) |  |
| Company Phone |  |
| Business Email |  |

|  |  |
| --- | --- |
| Company Information | |
| Number of Employees |  |
| Revenue Size and/or assets under management |  |
| Brief Company and Industry Description |  |

|  |  |
| --- | --- |
| Education | |
| Undergraduate College, including degree/course of study |  |
| Graduate College, including degree/course of study |  |
| Professional Certifications |  |

|  |  |
| --- | --- |
| Board Service and Charitable Activities | |
| On What Boards is the Candidate Currently Serving On? |  |
| On What Boards has the Candidate Served on in the Past? |  |
| What Other Professional or Charitable Organizations Does the Candidate Belong To? |  |

|  |  |
| --- | --- |
| Nomination Endorsement  Please indicate another CFE Member who has agreed to endorse this candidate and provide a letter of endorsement.  NOTE: If the sponsor, candidate, and seconding member are not from three different companies/organizations, one additional endorsement is required for the nominee packet. | |
| Sponsor’s Name and Phone |  |
| Supporting Member Name and Phone |  |
| 2nd Supporting Member Name and Phone (if applicable) |  |

**Thank You For Your Submission  
*The Sponsor’s responsibility does not end with the candidate’s acceptance for membership.   
The Sponsor’s greatest role is encouraging and supporting the candidate’s active integration into CFE*.**