**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 “Nominate a New Member” in the Membership pull-down menu of the CFE website.***

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

* Completed prequalification and nomination form
  + *Must be completed by 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.*

***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 as a guest (*five held annually*).
* 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. Board meetings are typically held the second Monday of the month in February, April, June, August, October and December.
  + *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*.**