

**2019-2020 CFA Society Toronto Board of Directors Candidate  
Nomination/Sponsorship Form**

Dear Member:

CFA Society Toronto is a not-for-profit organization supporting the professional development and advancement of CFA® charterholders. The Society provides member services including educational programs, sponsored events, job placements, and networking opportunities. The Society strives to enrich these services by:

1. **Drive Member Value:** *Meet member needs and expectations with innovative services and expanding member community*
2. **Increase Designation Value:** *Establish designation as “gold standard” with industry stakeholders*
3. **Increase Efficiency & Talent Development:** *Enhance high-performing member-centric organization through appropriate systems, revenue sources and talent management*

All of these goals require visionary and effective leadership.

Nomination Criteria

The Governance and Nominations Committee will be looking for nominees who possess the following qualities:

- Show a commitment to support decisions and directions set by the Board of Directors
- Contribute to an environment of mutual respect between the Society’s employees, volunteers and Board members
- Commit to support mission of the Society through committee initiatives
- Reflects the diversity of the CFA Society
- Able to devote the requisite time to fulfil their duties as Board members

Volunteer Board members are provided an opportunity to contribute career advancement and enhance the value of the Society, while exchanging ideas and perspectives with industry leaders. On behalf of CFA Society Toronto, we thank you for your continued support.

Sincerely,  
Pamela Steer, CFA  
Past Chair, Governance & Nominations Committee Chair

PLEASE NOTE: This form and all supporting documentation must be returned to CFA Society Toronto by **19 April 2019**. Please send to the Governance and Nominations Committee via email: [hmooney@cfatoronto.ca](mailto:hmooney@cfatoronto.ca) or fax to: 416-366-6716.

**Personal Contact Information**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Company Name: \_\_\_\_\_ Position: \_\_\_\_\_

- Self-Nomination                       Sponsorship\*

\*Sponsors may be contacted by the Governance and Nominations committee for further information.

## Nomination/Sponsorship Form

### DUTIES OF BOARD MEMBERS

Board members attend one meeting per month in addition to contributing to their respective committee meetings. In Board service you may be asked to contribute additional time and effort on special committees.

### SECTION A

Nominee Information *(If self-nominating, please complete SECTION B):*

Nominee Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Company Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

**DECLARATION:** I hereby recommend consideration of \_\_\_\_\_ as a candidate for nomination to CFA Society Toronto's Board of Directors.

I believe this person is capable of fulfilling the responsibilities of a Board member because of the following attributes:

NAME: \_\_\_\_\_

SIGNED: \_\_\_\_\_

DATE: \_\_\_\_\_

### SECTION B

*In addition to completing the form below, please include your current resume.*

- Self-Nomination  
 The following individual has nominated me and **has submitted the appropriate section of the form:**

Name: \_\_\_\_\_ Phone: \_\_\_\_\_ Email: \_\_\_\_\_

Company Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Requested Board Position/Portfolio: \_\_\_\_\_

1. Please provide details of your previous volunteer experience with CFA Society Toronto, CFA Institute, or other volunteer organizations:

2. Why would you like to join CFA Society Toronto's Board of Directors? Why do you feel you are best suited for your chosen portfolio?

3. What significant issues do you feel affect charterholders and how would you address them through your role within the Society?