

2022-2023 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 postings, and networking opportunities. The Society strives to enrich these services by fulfilling the following strategic initiatives:

1. **Increase growth and connectivity for key stakeholders:** *Meet stakeholder needs and expectations with innovative services and meaningful opportunities to connect*
2. **Build designation value:** *As a global leader, advance designation with all stakeholders to foster pride in the profession*
3. **Advance sustainability and resilience for Society:** *As a steward for our members and stakeholders, continue to refine and modernize the Society*

These goals require effective visionary leadership.

Nomination Criteria

The Governance and Nominations Committee are seeking candidates who possess the following qualities:

- The 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 the mission of the Society through committee initiatives
- Represent CFA Society Toronto's diverse community
- Devote the requisite time to fulfil the duties as a Board member

Evaluation Criteria

Applicants approved by the Board for nomination will be contacted and informed of the Board's decision, **subject to security, credit and education checks as well as professional references.**

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,

CFA Society Toronto Governance & Nominations Committee

PLEASE NOTE: This form and all supporting documentation must be emailed to: Nominations@cfatoronto.ca no later than **27 June 2022 at 4:00 PM DST**. If you require additional space for your responses, please complete on a Word document and submit with your application.

Applicant Contact Information

Name: _____ Phone: _____ Email: _____

Company Name: _____ Position: _____

- Sponsorship** - **Please complete Section A**
- Self-Nomination - **Please complete Section B**

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

DUTIES OF BOARD MEMBERS:

Board members attend up to seven meetings per annum in addition to contributing to their respective portfolios and attending key Society events. 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 can fulfill the responsibilities of a Board member due to the following attributes:

Name: _____ Signed: _____

Date: _____

SECTION B: Self- Nomination Information

Please Note the **top two** boxes are mandatory:

- By checking this box, successful applicants agree to comply with requirements for completion of **criminal record check, credit check, education verification and 3 Executive References** (subject to change).
- In addition to completing the form below, please include your current resume.
- The following individual has nominated me and **has completed Section A of the form:**

Name: _____

Phone: _____

Email: _____

Company Name: _____ Relationship: _____

Preferred Board Position/Portfolio: _____

1. Please provide any details of 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 and 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?