

Local Only/Student/Retired Membership Reference Form



2025-26 Application

- Local-Only applicants need 2 references, and 1 must be a CFA Society Minnesota member
- Student applicants need only 1 reference, who can be a professor

Applicant Information

Mr./Mrs./Ms. First Middle Last

Employer/School Name Job Title

Other information
(Check all that apply)

Student

Self-Employed

Reference's Information

Mr./Mrs./Ms. First Middle Last

Relationship to Applicant Supervisor Co-worker Other

Are you a Regular Member of CFAMN? Yes No

Are you a CFA® Charterholder? Yes No Charter#

Employer/School Job Title/Department

Street Address Floor/Suite City/State/Zip

Phone Email

Reference's Findings

1) What is the applicant's primary full-time, professional occupation? (Please be specific)

2) Are you aware of any problems regarding the applicant's professional competence? Yes No

3) Are you aware of any problems regarding the applicant's character or professional, financial, or business conduct? Yes No

Reference's Signature Date