

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
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