

CSA Board of Standards

Director Nomination Form

Please mail nominee materials to the CSA Board address as shown at the bottom of this form. Nominators and nominees must be active CSAs; self-nominations are acceptable. New directors are elected from a pool of eligible candidates by a majority of members on the Board. New directors are expected to serve a three-year term.

Duties of a Board member include reviewing complaints lodged against CSAs, attending regularly scheduled Board meetings (via teleconference), and attending the CSA Summit conference as scheduled.

I, _____, nominate _____ for election as a director to the CSA Board of Standards. I believe that this nominee meets the eligibility criteria below and, if elected, would be a strong addition to the Board.

- Personal and professional integrity and honesty
- Ability to objectively analyze complaint materials
- Commitment to fulfill responsibilities as a Director
- Ability to work well with other Directors

Nominee Information

(Please Print)

Date _____ (circle one): Mr. Ms. Mrs.

Last Name _____ First Name _____ M.I. _____

Company Name _____ Referred by _____

Mailing Address: Street _____

City _____ State _____ ZIP _____

Business Phone () _____ Ext. _____ Fax () _____

Home Phone () _____ E-mail _____

Occupation _____ License(s) _____

Designations or Certifications _____

Nominator Information

(Please Print)

Date _____ (circle one): Mr. Ms. Mrs.

Last Name _____ First Name _____ M.I. _____

Company Name _____

Mailing Address: Street _____

City _____ State _____ ZIP _____

Business Phone () _____ Ext. _____ Fax () _____

Home Phone () _____ E-mail _____

Occupation _____ License(s) _____

Designations or Certifications _____

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Nominee Biographical Data

Please attach to this form nominee biographical data that provides a summary of this information:

- **Current employment and academic degrees received.** List your name, current position title, and current employer. List academic degree(s), date(s), and granting institution(s) in reverse chronological order.
- **Additional activities and honors.** In reverse chronological order, list any pertinent professional activities and/or honors received.

Feel free to use the following sample as a formatting and content guideline.

Jonathan D. Doe, CSA. Vice President of Corporate Accounts, Coolidge Financial Group. MBA, Pepperdine, 1998. BS, Economics, California State University at Northridge, 1991. **Additional activities and honors:** Member, City of Tarzana Economic Development Council (2002–present); Regional Coordinator, Focus on Seniors (2001–2003). Recipient of City of Tarzana Municipal Achievement Award, 2003.

Nominee Position Statement

Please attach to this form the nominee's position statement. This statement, which should be no longer than 200 words, conveys the nominee's philosophy of business ethics and what he or she perceives the role and responsibility of the CSA designee to be.

Nominee Letters of Reference

Please attach to this form three letters of reference that endorse the nominee's election to the CSA Board of Standards. One letter should come from someone in the nominee's profession; two should come from individuals in other professions. *Reference letters should be mailed directly to the Board at its address below.* Among the factors the letter writer might consider are the nominee's professional background and competency, experience in connection with the senior market, prior service on review or advisory boards, and exemplary character attributes.

Nominee Disclosure Questions

Please answer the following questions. For "yes" answers, please include a detailed written explanation as well as any supplemental documentation that supports your explanation.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	1. Have you ever been accused or convicted of a felony?
<input type="checkbox"/>	<input type="checkbox"/>	2. Have you ever been a defendant or respondent in any criminal action relating to your professional or business conduct, or are you currently named as a party in any such action?
<input type="checkbox"/>	<input type="checkbox"/>	3. Have you ever been a defendant or respondent in a civil action, which includes, but is not limited to, a lawsuit, arbitration, or mediation relating to your professional or business conduct, or are you currently named as a party in any such action?
<input type="checkbox"/>	<input type="checkbox"/>	4. Have you ever had a license, permit, certificate, registration, or membership denied, suspended, revoked, or restricted by any governmental, regulatory, or administrative body, or has any such body censured, fined, restricted or reprimanded you?
<input type="checkbox"/>	<input type="checkbox"/>	5. Has any governmental, regulatory, or administrative body ever named you, or a company in which you are a principal, in an investigation or complaint?
<input type="checkbox"/>	<input type="checkbox"/>	6. Have you ever been censured, fined, reprimanded, or otherwise disciplined by any professional credentialing organization to which you did or do belong, or has such organization named you as a subject of an investigation or complaint?

Nominee Name (print)	Nominee Signature	Date
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In connection with its review of these nomination materials, the CSA Board of Standards may contact the nominee and/or references to clarify information or to conduct a telephonic interview.