



**leadership beyond finance**

**FEI Canada – PROSPECT REFERRAL FORM**

(This is not an application for membership. Applications can be found on the FEI Canada website at [www.feicanada.org](http://www.feicanada.org) or contact the FEI Canada office at 416-366-3007x5105)

**Referring member:** \_\_\_\_\_ **Chapter:** \_\_\_\_\_

**Complete this form and return it to Wendy Siegel by e-mail [wsiegel@feicanada.org](mailto:wsiegel@feicanada.org) or by fax 416-366-3008.**

Mr.  Mrs.  Ms.

First Name:	Last Name:
Title:	Company:
Address:	City:
Postal Code:	Province:
Telephone:	Email:

***If the prospect is currently between jobs, please indicate their current contact information and last position where they would have qualified for membership.***

**MEMBERSHIP CRITERIA**

Two categories automatically qualify for full executive membership:

Chief Financial Officer of a publicly traded company.  Audit committee members of a publicly traded co

All other applications are subject to the approval of FEI Canada. Typical qualifying titles include Chief Financial Officer, Chief Accounting Officer, Controller, Treasurer, Vice President of Finance, Vice President of Planning and Analysis, Vice President of Taxes, Vice President of Pension Fund Investments, Vice President of Risk Management, Director of Finance, Taxes, Treasury, Accounting, and Audit Committee member.

An applicant’s organization must meet one of the following size criteria:

Total Net Worth \$3 Million +  Total Revenues \$10 Million +

Applicant Areas of Responsibility and Expertise/Industry Experience:

- |   |   |
|---|---|
| <input type="checkbox"/> Accounting & Control                         | <input type="checkbox"/> Planning and Forecasting |
| <input type="checkbox"/> Information Systems                          | <input type="checkbox"/> Risk Management          |
| <input type="checkbox"/> Internal Audit                               | <input type="checkbox"/> Treasury & Finance       |
| <input type="checkbox"/> Management of Retirement Funds & Investments | <input type="checkbox"/> Tax Administration       |

Individuals may qualify if they have held a senior financial executive position within the past five (5) years from the date of application. Individuals in transition may qualify. An up to date copy of the applicant’s resume is required under these circumstances.

Financial service vendors, including external auditors, bankers, systems information consultants and recruiters do not qualify for membership with FEI Canada, unless the individual is a top financial executive with that service organization.