



ALLIANCE OF MERGER & ACQUISITION ADVISORS®

## CERTIFIED MERGER & ACQUISITION ADVISOR (CM&AA) Character Reference

Applicant's Name:

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The above named individual has applied for the professional designation, Certified Merger & Acquisition Advisor (CM&AA), offered by the Alliance of Merger & Acquisition Advisors. You are asked to serve as a character reference. Your answers should relate to the applicant's M&A experience and his/her ability to maintain professional and ethical standards. Please complete and return this form to the AM&AA at the address shown at the end of this form. Thank you.

1. How long have you known the applicant? \_\_\_\_\_ Years

2. Are you related to the applicant?  Yes  No

3. Is the applicant currently in your employ?  Yes  No

If yes, what is the applicant's position title? \_\_\_\_\_

4. If not your current employee, please describe the context, circumstances, or connection you have with the applicant \_\_\_\_\_  
\_\_\_\_\_

5. Does the applicant have any experience in merger & acquisitions?

Yes  No  I Don't Know

Comments: \_\_\_\_\_  
\_\_\_\_\_

6. Does the applicant have a good reputation with respect to personal character?

Yes  No  Maybe

Comments: \_\_\_\_\_  
\_\_\_\_\_

7. In general, is the applicant's professional integrity above reproach?

Yes  No  Maybe

Comments: \_\_\_\_\_  
\_\_\_\_\_

8. Is there anything in the present or past that could possibly reflect unfavorably upon the applicant as a CM&AA?

Yes  No  Maybe

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

9. Is there any additional information you think would assist the AMAA in evaluating the applicant as a candidate for certification as a CM&AA?

Yes  No

Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

***Referee Information*** (Please Print):

Your Name: \_\_\_\_\_

Title: \_\_\_\_\_

Firm/Business Name: \_\_\_\_\_

Business Address \_\_\_\_\_

Street: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: ( ) \_\_\_\_\_

Email: \_\_\_\_\_

***Mail To:***

**AM&AA Committee on Certification  
Alliance of Merger & Acquisition Advisors**

200 E. Randolph St., 24<sup>th</sup> Floor

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***THANK YOU!***