



## 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 AMAA 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:***

**AMAA Committee on Certification  
Alliance of Merger & Acquisition Advisors**

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***THANK YOU!***