



THIS FORM MUST BE RECEIVED NO LATER THAN MAY 15, 2012

Personal Data Form

This form will serve as the ***first review of candidates***, so please provide thoughtful answers.

Please return this data form with your current resume and three letters of reference.

Name _____

Title _____

Company _____

Address _____

City, State, Zip Code _____

Company Phone Number (with Area Code) _____

Cell Phone (with Area Code) _____

Home Phone Number (with Area Code) _____

Fax Phone Number (with Area Code) _____

E-Mail Address _____

Chapter Affiliation _____

Designations _____

Are you a member of WIFS; if yes, for how long? _____

Education: _____

Present Occupation ☐ Practicing agent / registered rep / financial advisor
☐ Branch/agency management
☐ Corporate position
☐ Other (describe) _____

Position: ☐ Solo Practitioner ☐ Owner ☐ Field Manager ☐ Salaried Employee

Brief description of your current business position or professional practice:

Previous Work Experience:

Has there been any disciplinary or civil action entered against you either by a governmental association or legal body?

☐ No

☐ Yes (please explain on a separate sheet)

Please disclose/list any involvements with other organizations, with vendors, or any other associations that could conceivably produce a conflict with WIFS Board discussions.

WIFS leadership roles held (including chapter offices and committee work):

Other professional association leadership experience:

Other community or organizational leadership experience:

In 500 words or less, why do you want to serve on the WIFS Board of Directors?
(Please feel free to use the space below and/or attach a separate page.)

In 500 words or less, what is your vision of WIFS 10 years from now?
(Please feel free to use the space below and/or attach a separate page.)

What is your personal view on leadership and how do you see leadership as a function in an organization like WIFS?

Please identify specific areas of interest that you believe will advance the mission of WIFS.

Comment on your ability to meet the board service expectations as described in the board expectations document. Do you believe you have the time for service?

If you have any questions with regards to Board service, please contact one of our current Board members, a list of which can be found at <http://www.wifsnational.org> (under the heading: "About WIFS")

Please return this form along with any attachments and letters of reference to:

WIFS—Board of Directors
136 Everett Road
Albany, NY 12205

Or, scan your documents and email to: office@w-wifs.org