



Master Financial Modeler

APPLICATION FORM

RECOGNIZING FINANCIAL MODELERS FROM AROUND THE
WORLD WHO EXHIBIT THE HIGHEST LEVEL OF EXPERIENCE,
SKILL, LEADERSHIP AND CONTRIBUTION.



FINANCIALMODELING
INSTITUTE



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Introduction

Welcome

The MFM accreditation is unlike anything in the world today. It represents the most prestigious level of recognition globally for financial modelers.

This document will guide you through the process of submitting an application to be considered for the Master Financial Modeler accreditation from Financial Modeling Institute (FMI).

Master Financial Modeler (MFM) Accreditation

FMI's mission is to elevate the profession of financial modeling by establishing the world's leading community of accredited financial modelers.

One way we will achieve this is with a growing cohort of MFMs that truly represents excellence through lifetime experience and achievements in the discipline of financial modeling.

Through a rigorous application process, the MFM accreditation will be awarded to those professionals who have achieved the pinnacle of financial modeling experience, skill, leadership, and contributions to the field.

The MFM recognizes the very best modelers in the world and showcases their talents and contributions. In return, those who are granted the MFM accreditation will use this achievement and recognition to give back to the modeling community.

If selected as an MFM, you will become a global ambassador in the community, promoting excellence in financial modeling in the following ways:

- Adjudicating future MFM candidates
- Sharing thought leadership content with the FMI Community
- Speaking at relevant events
- Promoting FMI
- Contributing to the field of financial modeling

Financial Modeling Institute (FMI)

FMI provides independent, rigorous testing of financial modeling proficiency with its various programs and accreditations. The accreditation exams are challenging and require a high degree of effort, skill, and acumen to successfully pass. Attaining an accreditation from FMI distinguishes those who have demonstrated exceptional modeling skills.



Application Process

Financial Modeling Institute invites you to apply for the MFM accreditation to demonstrate your mastery of financial modeling.

Application Details

The application deadline is **December 31, 2023**.

MFM applications will be reviewed by a peer group from around the world, including MFMs, who will form the Adjudication Committee.

In early 2024, you may be asked to meet with members of the Adjudication Committee to discuss your application the Committee will then meet to decide which candidates will be granted the MFM accreditation.

Applications should be emailed to **MFM@fminstitute.com** with the subject: **MFM Application**. Attachments can include Word documents, PDF files, videos, and Excel spreadsheets.

Code of Conduct

Applicants must attest that they created any submission materials and that they abide by FMI's Code of Conduct (<https://fminstitute.com/code-of-conduct/>).

Criteria

Summary

Below are the criteria to become a Master Financial Modeler. As part of your application, you need to demonstrate and/or submit the following:

1. Modeling Experience

As an MFM candidate, you will need to demonstrate at least 10 years of meaningful experience in the field of financial modeling. This can be through a combination of work experience and volunteer experience. You can also share details on any professional awards received that would support your application.

2. Mastery of Technical Modeling Skills

MFM accreditation holders have demonstrated world-class financial modeling skills. As an applicant, it is preferred and highly recommended that you have attained the Chartered Financial Modeler (CFM) accreditation prior to applying for the Master Financial Modeler accreditation. However, FMI will consider your application if you have other ways to demonstrate exceptional modeling proficiency.

If you have not achieved the CFM accreditation, please include a letter and contact information from a nominator who can attest to your technical proficiency and suitability to be considered for the MFM accreditation.

3. Contributions to the Field

As an MFM candidate, you will need to demonstrate leadership and contributions to the field of financial modeling.

FMI will consider MFM candidates who have made **significant** contributions to the field of financial modeling. Examples of significant contributions include authorship of financial modeling books and/or publications, leadership at financial modeling conferences and events, extensive financial modeling teaching and coaching in a professional environment, content development, and volunteering through board work and mentorship.

4. Submission

As an MFM candidate, you will need to submit materials to be reviewed by the Adjudication Committee that support your candidacy. This can include models, articles, papers, training materials, videos, etc. Sensitive information should be redacted.

5. References

Please include contact information for at least two references who can attest to your proficiency in financial modeling and suitability for the MFM accreditation.

MFM Application Requirements

1. Modeling Experience

a) Employment History / Professional Career

Provide details of your career path, starting with your current position first. Describe your roles and achievements, particularly as they relate to financial modeling and the results that were achieved because of these models.

In a separate document, please include a table like the one below that lists your most recent positions (covering at least 10 to 15 years), including descriptions of key accomplishments in each role.

EMPLOYER NAME	POSITION/TITLE	DATES	ACCOMPLISHMENTS
Employer Name(s)	Position or Title		Descriptions

b) Volunteer Contributions

Please describe any important modeling-related volunteer activities with civic, community, charitable or professional organizations, starting with the most recent.

ORGANIZATION NAME	CONTRIBUTIONS	DATES
Organization Name(s)	Description	

c) Awards / Professional Recognition

Provide details on any awards / acknowledgements that you have received that would support your application, starting with the most recent:

AWARDS RECEIVED	DETAILS OF AWARD	DATE
Award Name	Award Details	

2. Mastery of Technical Modeling Skills

Applicants with a CFM accreditation do not need to provide anything for this section.

For those applicants who have not attained the CFM accreditation, please include a letter and contact information from a nominator who can attest to and describe your technical modeling acumen and proficiency.

3. Demonstrated Contributions to the Field

In a separate document, please describe your contributions to the field of financial modeling.

Tell us about any experience or involvement with:

- Idea generation
- Content creation
- Authorship of books/ publications
- Speaking engagements
- Work on various projects
- Teaching / coaching
- Other

In essence, the Committee is looking to see your body of work in financial modeling, including descriptions of many of the models or modeling projects you have worked on, and the impact of these models on clients and projects.

4. Submission

Please submit a selection of materials to be reviewed by the Adjudication Committee that support your candidacy. This can include models, articles, papers, training materials, videos, etc. Sensitive information should be redacted.

5. References

Please include contact information for at least two references who can attest to your proficiency in financial modeling and suitability for the MFM accreditation.

Submission

Instructions

Your application email, which contains all supporting documents, must be emailed to **MFM@fminstitute.com** no later than **December 31, 2023**.

Upon submission, you will receive a confirmation receipt email.

Thank you for your submission. We look forward to reviewing your application.

Checklist

Please ensure the following information has been included:

- ☐ Signed signature page / attestation (this page)
 - Full Name, mailing address and email address
- ☐ Modeling experience, including:
 - Employment history
 - Volunteer Contributions (if relevant)
 - Awards received (if relevant)
- ☐ Attestation letter for applicants who have not attained the CFM accreditation
- ☐ Description of contributions to the field of financial modeling
- ☐ Submission files (Models, articles, papers, training materials, videos, etc.)
- ☐ Contact information for at least two references who will be contacted by the Committee

Signature Page/Attestation

I confirm that all information in my application is correct, all work submitted is my own, and I have abided by the FMI Code of Conduct.

Name

Signature

Date:

