CFA Society United Kingdom

Investment Committee Member

No of new member volunteers	**1**
Timeframe	**5 years**
Commitment	**4 meetings per year**
Reports to:	**Investment Committee Chair**

The CFA UK Investment Committee is a standing committee of the CFA UK Board reporting to the Finance Committee and the Board. The Investment Committee oversees the Investment Reserves of the Society and makes investment decisions relating to its portfolio.

Purpose and Activities

As a Member your role would be to:

- recommend an appropriate investment policy for the Society's Investment Reserves.
- contribute to the long term financial stability of the CFA UK by overseeing the
- management of the Society's Investment Reserves in accordance with the Investment
- Reserves Policy.

And your responsibilities/activities extend to:

- Commitment for term of 5 years
- Uphold the values and objectives of the Investment Committee;
- Attend at least three out of four meetings in a year;
- Give adequate time and effort to member duties (reviewing portfolio performance, research
- and propose fund additions/deletions; possibly manager visits or strategy/policy reviews)
- Contribute to the work of the committee and to the fulfilment of its responsibilities;
- Show courtesy and respect to other members of the Investment

Who are we looking for?

A CFA Charter holder with a minimum 10 years of experience and demonstrated expertise in at least 2 of the following:

- Current active manager selection responsibility
- Liquid alternative due diligence and manager selection
- Strategic and tactical asset allocation
- Wealth Management portfolio responsibility

What will you gain from volunteering in this role?

- Make a difference to the long term financial stability of CFA UK
- Share portfolio and investment fund expertise with other like-minded professionals
- Gain insight into the inner workings of the Investment Committee, the Finance Committee
- and the Board of Directors of CFA UK
- Build your profile by being part of the CFA UK volunteer network

If you are interested in applying for this opportunity, please download the Volunteer Application form and return it along with a copy of your CV to volunteer@cfauk.org

Deadline [for applications]: 31 May 2018