



## Universities Research Challenge UK Working Group

<b>No of new member volunteers</b>	<b>5</b>
<b>Timeframe</b>	<b>September 2018 – March 2019</b> (with the opportunity to attend EMEA final, Switzerland in <b>April 2019</b> )
<b>Commitment</b>	<b>10 days across key months</b> <b>Sept, Oct, Jan, Feb &amp; March</b>
<b>Reports to:</b>	<b>Staffed Office Reps &amp; CFA Institute</b>

The CFA Institute Research Challenge is an annual, global competition that provides university students with hands-on mentoring and intensive training in financial analysis. Students work in teams of 5 per university to research and analyse a publicly traded company, and then write a research report on their assigned company with a buy, sell, or hold recommendation. Local societies across the globe run this event through volunteers. For the next academic year, we are transitioning to a completely volunteer run event, with some level of assistance from the CFA UK staffed office and CFA Institute.

The winning university team from each local competition advances to one of the three regional competitions.

### Purpose and Activities

- Hosting a kick off webinar for all participating students
- Working with the judging panel to assign a subject company
- Inviting universities in their geographic region to participate
- Event management – securing relevant speakers
- Endorsement of Research Challenge via Social Media
- Securing mentors to work with students
- Securing volunteer graders to assess student reports
- Liaison with universities finance course directors

### Who are we looking for?

- You are passionate about the Research Challenge and Equity Analysis
- You enjoy being a mentor for students and want to give back to future investment professionals
- Ability to work with a group to co-ordinate the event with assistance from staffed office and CFA Institute
- You enjoy creating an engaging event, coupled with excellent communication via social media and your own networks in the investment industry to increase interest and attendees

### How the CFA UK will help:

CFA UK will provide an overview of what is required from the role, how the challenge works, and will provide a timeline of key months and activities, to ensure you are aware of the requirements. CFA Institute will provide general assistance on all things CFA research challenge related.

### What will you gain from volunteering in this role?

- You will get the opportunity to attend the regional finals, hosted by CFA Institute in Zurich, Switzerland
- Be an influential, inspirational mentor for aspiring finance students – you will be giving back
- Gain social media marketing skills and build your own social media influencer status
- Meet all competing student teams and volunteers across EMEA
- Organising a fun, fulfilling event for the investment professionals of the future



- Opportunity to meet and network with other like-minded investment professionals
- Be recognised for your contributions and have the opportunity to attend a recognition event exclusive to the volunteer community

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](mailto:volunteer@cfauk.org)

**Deadline: 20<sup>th</sup> July 2018**