

## Working group member: Behavioural Finance

<b>No of new member volunteers</b>	<b>3</b>
<b>Timeframe</b>	<b>Membership year 2019/20</b>
<b>Commitment</b>	<b>30 hours</b>
<b>Reports to:</b>	<b>Content steering committee</b>

Behavioural finance is a field that seeks to combine behavioural and cognitive psychological theory with conventional economics and finance to provide explanations for why people make irrational financial decisions and is a topic of great interest to our membership. CFA UK would like this working group to bring greater understanding of this subject through a variety of live events, webinars and online content sharing to our membership.

The group should aim to deliver a programme across the 2019-20 membership year that engages with as much of CFA UK's membership as possible.

### Responsibilities and activities:

- Assess the behavioural finance topics that would be of most interest to the membership
- Bring forward fresh ideas to tackle those topics, identify the most appropriate speakers and engage with them
- Deliver two live events, each one within the month allocated in the events plan which runs alongside the membership year and ends in June 2020. For the subject of behavioural finance one of these events could be with a paid for speaker – this will need to be discussed in detail with the team at CFA UK.
- Host your working group events to help ensure a great experience for attendees including assistance with networking
- Deliver three webinars across the membership year
- Create and curate four or more pieces of online content either as a direct result of the events you have organised or separately to those events. The CFA UK staffed office will provide guidance and equipment as necessary. Online content could include the following:
  - Written articles discussing/reviewing your events or tackling related content
  - Audio recordings (short podcasts) that incorporate some event material with interviews with speakers
  - Short pieces of video created in consultation with the staffed office
- Develop an executable plan to ensure all deliverables are achieved

### Who are we looking for?

- Volunteers who understand behavioural finance through real life application of the theories in their work
- Volunteers who hold a formal qualification in behavioural finance
- Availability for around six meetings throughout the membership year plus conference calls and work to move ideas forward between meetings
- Ability to work with a group to shape ideas.
- Understanding of what would interest the membership around this topic area

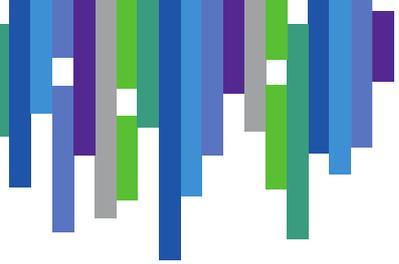
### How CFA UK will help:

CFA UK staff will attend your first meeting of the new membership year and deliver a short 30 minutes workshop to help you understand better how to achieve the deliverables you have been tasked with.

CFA UK will work out all logistics for the events (booking venues, working with suppliers etc.), all marketing to the membership via the events listing and emails, the technical operations for the webinars and posting the content online. Where a potential speaker is not known to the group, we suggest asking for support from the staffed office.

### What you will gain:

- Build your profile within the CFA UK network of volunteers, the wider membership and the industry
- Develop leadership, communication and team work skills through our volunteer personal development training
- Recognition for your contribution in shaping and delivering services to the membership
- Opportunity to meet and network with other like-minded investment professionals
- Volunteering brings a “shared experience” amongst peers that has long lasting benefits for your career
- Learn more about what to expect from volunteering in our FAQs [here](#)



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 for applications:** 10 July 2019