

CFA INSTITUTE RESEARCH CHALLENGE



CFA Society
Toronto



CFA Society
Ottawa

2019–2020 Research Challenge Local Competition Timeline

Friday, October 4, 2019 by 5PM

CFA Society Toronto team registration deadline. Team Faculty Advisor will register complete team.

Thursday, October 10, 2019, 3-4PM

Kick-off conference call with all participating teams. Subject Company will be announced, and timeline and rule updates discussed.

By Friday, October 25, 2019

Team mentors will be assigned for teams that have indicated on their online team registration that we appoint a team mentor. This is also the deadline for teams to indicate to the Society if they've designated their own team mentor.

Friday, October 31, 2019 by 12PM

CFA Institute team **Faculty Advisor** deadline to [register](#) your complete team with CFA Institute. Students will receive a confirmation email from the Institute after they're registered.

Monday, November 11, 2019 by 12PM

Team deadline to submit 3 questions to CFA Society Toronto for Subject Company's response. 2 rounds of conference calls will be established and each team, after their questions are collected, will have a date and time slot assigned to them.

Wednesday, November 27, 2019, 3-5PM

Subject Company conference call with all team representatives to answer team questions.

Friday, December 6, 2019 by 12PM

Team deadline to submit 1 follow-up question to CFA Society Toronto for Subject Company's response. Subject Company's 3rd quarter numbers will be released by this time and follow-up question can reference this detail. Subject Company will response by December 13th.

Thursday, January 23, 2020 by 5PM

Written reports due to CFA Society Toronto. Report graders will have 2 weeks to review and score all reports.

Friday, February 7, 2020

Top 4 scoring teams will be announced. Top 4 teams will advance to the presentation portion of the local competition.

Monday, February 17, 2020 by 12PM

Top 4 teams' local competition PowerPoint presentations due to CFA Society Toronto.

Thursday, February 20, 2020, 3-5PM Competition, 5:30-7:30PM Annual Awards Reception

CFA Institute Research Challenge CFA Society Toronto and CFA Society Ottawa local competition and Annual Awards Reception for all CFA Society Toronto student awards and challenges.