

2019-2020 CFA Society Toronto Volunteer Role

Committee Volunteer Role: Institutional Asset Management Committee Member

Scope of the Role

CFA Society Toronto's Institutional Asset Management Committee is looking for volunteers interested in contributing to professional development and networking events for CFA® charterholders and other professionals.

The Institutional Asset Management committee focuses on developing high quality programs and events that incorporate, but is not limited to, Equity, Fixed Income/Currency/Commodities (FICC), Risk Management, Alternative Investments and/or Portfolio Management perspectives that are relevant for the benefit and progression of institutional asset management end-users in the industry.

Where applicable, content will be developed within a framework that is meaningful for various member tenure cohorts (<5yrs, 5-10yrs, 10+yrs).

The Institutional Asset Management committee is looking for people who have a background in Private Equity, Venture Capital, Private Alts, Technology, or in Foundations and Endowments specifically.

We invite members from the 5-10 yrs and 10+ yrs cohorts and particularly encourage those with 10+yrs of CFA® charterholder experience, to apply.

Goals

- Contribute to generating effective programming to meet the professional development needs of the CFA Society Toronto membership
- Focus on quality control, performance, efficiency and member requirements to create and maintain a standard of excellence

Duties and Responsibilities

- Attend committee meetings
- Work with committee on event timing, formats, topics, attendance, member feedback to improve our professional development offers
- Identify areas to educate members and investment professionals
- Liaise with relevant management office members, managers, professional development and events to ensure events are supported, marketed and delivered on a seamless, cost-effective basis

Time Commitment

- Role starts September 1, 2019 and ends August 31, 2020, yearly renewal dependent on committee chair's approval
- Term limit for committee members is 3 years with possible renewal for a second 3-year period (some exceptions may apply)
- Average 2-4 hours per week
- Monthly committee meetings, 1.5-hour meetings (last Tuesday of every month, noon to 1:30 pm)
- 1-2 events per year, must assist and attend 1 event



Characteristics

- Must be a CFA Society Toronto member and a member in good standing
- Strong communicator and facilitator
- Excellent organizational skills
- Proven strategic leadership skills
- Must have time to attend necessary meetings, events and program functions
- Be able to leverage speaker contacts for conference, workshops, and seminars