

## 2020-2021 CFA Society Toronto Volunteer Role

### Committee Volunteer Role: Private Wealth Management Committee Member

#### Scope of the Role

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

The Private Wealth Management committee focuses on developing high quality programs that touches a wide spectrum of topics, including, but not limited to: income tax, behavioural finance, estate planning, practice management, relationship management skills, regulatory updates, equity and fixed income management for private clients and portfolio management. This volunteer role is responsible for coordination and execution of high quality professional development and networking events that relate to all areas that impact private client practitioners for the benefit of CFA Society Toronto members.

The Private Wealth Management committee is looking for people who have a background working with private clients or in roles that directly lead or support individuals in those roles.

We encourage members who have **1 - 10yrs** of CFA® charterholder experience to apply.

#### Goals

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- 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

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- 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

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- Role starts September 1, 2020 and ends August 31, 2021, 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
- 1-2 events per year, must assist and attend 1 event



### **Characteristics**

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- 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
- 1-10 years of CFA® charterholder experience