

## **2017-2018 CFA Society Toronto Volunteer Position**

### **Volunteer Position: Corporate Finance Committee Member**

#### **Scope of the Position**

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

The Corporate Finance committee focuses on developing high quality programs that incorporates, but is not limited to, Equity, Fixed Income, Risk Management, Alternative Investments and/or Portfolio Management perspectives that are relevant for the benefit and progression of corporate finance end-users in the industry. This volunteer position is responsible for coordination and execution of high quality professional development and networking events that relate to Corporate Finance for CFA Society Toronto members.

The Corporate Finance committee is looking for people who have a background in Risk Management/Derivatives, Treasury, Debt Capital Markets, Foreign Exchange, Investor Relations, Investment Banking and Equity Capital Markets.

We invite members from all tenure cohorts (<5yrs, 5-10yrs, 10+yrs), and particularly encourage those with 10+yrs 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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- Position starts October 2017 and ends June 30, 2018, 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-hour meetings (Friday, noon to 1 pm)
- 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

**To apply, please click [here](#).**

## TERMS OF REFERENCE – Corporate Finance Committee

Committee Type: Programming

### Purpose of the Committee

The Corporate Finance committee focuses on developing high quality programs that incorporates, but is not limited to, Equity, Fixed Income, Risk Management, Alternative Investments and/or Portfolio Management perspectives that are relevant for the benefit and progression of corporate finance 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).

### Scope

In context of the committee's purpose, committee volunteers and Society staff work in conjunction to successfully **plan, market and deliver** high quality programs consistent with members needs in an effective and efficient manner that elevates our brand.

Committee volunteers contribute the KNOW-WHAT by being the **content experts** - spotting industry trends, identifying critical issues, and in general, bringing forward relevant professional development and continuing education topics and opportunities in a timely manner. Leveraging professional experience and networks, volunteers are relied upon to source high caliber speakers and market\* events to the defined target audience, which is a vital component to every event's success.

Society staff contributes the KNOW-HOW by being the **logistics experts** – managing the overall feasibility and execution of events (Society event calendar, budgets, venue and vendor management, risk management, registration management, sponsorship, media coverage, etc.). Through existing channels, staff provides mass marketing support for events (ie. Tri-weekly eblasts, dedicated flashblasts, cross promotions with likeminded associations, and social media). Staff also provides the following administrative support for committee meetings: meeting logistics (calendar invites, dial-in information and catering) and assisting the Chair with meeting agenda and preparation.

Both volunteers and staff are responsible for the full and successful completion of a planned event.