

VOLUNTEER ROLE DESCRIPTION

CFA Society Toronto Student Ambassador

Role: Student Ambassador

Position Type: Volunteer

Term Length: 8 months (September 2026 – April 2027)

Purpose of the Role

The Student Ambassador Program aims to actively engage undergraduate students and faculty, promote awareness of the CFA Program and CFA Society Toronto, and foster strong connections with universities and colleges. As an ambassador, you will help spread knowledge about the benefits of the CFA Program, promote the University Relations Program, and build valuable relationships with your academic institution and peers.

Eligibility

- 3rd or 4th year undergraduate student currently enrolled in a finance or business program at an Ontario university or college.
- Graduate student currently enrolled in a Master of finance or business program at an Ontario university or college.

Priority will be given to students that are:

- In good academic standing
- Currently a member of a registered investment or finance club on campus
- A previous Student Ambassador with CFA Society Toronto
- A CFA Candidate
- A previous CFA Institute and/or CFA Society Toronto program participant (E.g. Research & Ethics Challenges, Undergraduate Awards, etc.)
- Recommended from a Society member

Key Responsibilities

- Complete monthly self-reporting on activities conducted. Performance reviews will be conducted with the assigned mentor once per semester.
- Serve as the primary connection between CFA Society Toronto and your school. Be the point of contact for any students or faculty that have questions about the CFA Program and CFA Society Toronto's post-secondary outreach programs including questions about application processes or status.
- Engage with faculty and finance and investment clubs on campus to promote CFA Society Toronto's University Relations Program. Share CFA Program and Society resource materials.
- Work together with the other Student Ambassadors at your school to exchange key learnings and support each other. As a team, decide who will take on which tasks and how you'd like to organize your responsibilities.
- Plan for succession by recruiting future Student Ambassador before the end of the school year.
- Promote Society initiatives and raise awareness of the following programs:
 - Undergraduate Awards
 - University Sponsorship Program
 - University Outreach Program
 - Student Ambassador Program
 - CFA Societies Canada Ethics Challenge
 - CFA Institute Research Challenge
 - CareerFest
 - And any additional ad hoc events or initiatives that may arise.

- Represent CFA Society Toronto at relevant school events on campus and encourage attending students to take the event survey. Events include:
 - Outreach requests for CFA Info sessions
 - Any events sponsored by CFA Society Toronto
 - A minimum of one Student Ambassador per school is required to attend each event.
- Attend all info and check in sessions. CFA Society Toronto will host two 1-hour virtual webinars for Student Ambassadors, once per school semester. All ambassadors are required to attend unless otherwise noted. If you cannot attend a session, contact universityrelations@cfatoronto.ca.
- Student ambassadors will be responsible for coordinating all meetings with your assigned mentor. Ambassadors are required to meet with their mentors a minimum of once per semester. Connect with your mentor to determine a time that works for both of you to meet (in person or virtual).
 - Student Ambassadors are expected to come to these meetings prepared with questions such as resume/CV feedback and interview tips, guidance on preparing for the CFA Program and becoming a Charterholder, or career pathways in the finance and investment industry.

Time Commitment & Term

- 8-month term, with the option to re-apply as a Student Ambassador for the following year if eligibility criteria are met.
- Approximately 5-10 hours per month.

Skills & Qualifications

- **Strong Communication:** Ability to clearly convey information about the CFA Program and CFA Society Toronto initiatives in one-on-one and group settings, engaging with a variety of audiences.
- **Leadership and Initiative:** Proactively attend relevant events, lead discussions, and represent CFA Society Toronto with enthusiasm.
- **Relationship Building:** Build and maintain relationships with peers, faculty, and industry professionals fostering a positive network.
- **Teamwork and Collaboration:** Able to collaborate effectively with fellow Ambassadors, sharing knowledge and supporting each other to achieve program goals.
- **Effective Time and Resource Management:** Manage multiple tasks effectively while maintaining attention to detail.
- **Passion for Professional Development:** A genuine interest in the CFA Program, finance, and motivating peers to explore related career and educational opportunities.

Training & Support

- Mandatory onboarding session in September
- Access to Student Ambassador Program resources and staff support
- Informational Society webinars
- One-on-one sessions with mentor

Benefits & Incentives

- **Mentorship:** Gain one-on-one mentorship with experienced CFA charterholders
- **Networking:** Opportunities to connect with CFA professionals and peers.
- **Invitation to an expert-led finance webinar:** Get access to attend a specialized free webinar hosted by the Financial Modeling Institute (FMI), the organization that develops the financial modeling content for the CFA exam.
- **Exclusive Events:** Opportunities to attend CFA Society Toronto events and dedicated student ambassador sessions.
- **Recognition:** Receive a certificate of participation recognizing your contributions as a Student Ambassador and be featured in the Spring issue of our quarterly magazine The Analyst, on our website, social media, and at the Annual Volunteer Appreciation Event.

- **Award Opportunity:** The top ambassador will receive a Star Ambassador award & prize, to be announced at an exclusive student mixer at the end of the academic year. Additional details will be shared with the selected student ambassadors.

Application Process

1. Students submit applications. The deadline to apply is August 1st, 2026.
2. Applications are reviewed by CFA Society Toronto's University Relations committee. Approved applicants will move on to the interview stage.
3. Interviews will be scheduled at the end of August to early September.
4. Selected student ambassadors will be notified by the beginning of September.

About CFA Society Toronto

CFA Society Toronto is the world's largest Society of CFA Charterholders and is dedicated to supporting the professional and business development of more than 11,500 members.

CFA Society Toronto is affiliated with CFA Institute, the global body that administers the Chartered Financial Analyst (CFA) curriculum and sets voluntary, ethics-based performance-reporting standards for the investment industry.