

# CFA SOCIETY CLEVELAND

## UNIVERSITY AMBASSADOR PROGRAM OVERVIEW

The CFA Society Cleveland University Ambassador Program connects and supports the relationship between CFA Charterholder Ambassadors and academic institutions. This initiative aims to promote the CFA Institute's educational programs and CFA CLE networking opportunities, fostering a deeper understanding and appreciation of ethical investment practices among students and a real connection to that vibrant community.

### GOALS OF THE AMBASSADOR PROGRAM

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- Act as the liaison between the university and CFA Society Cleveland.
- Foster student engagement and professional development within the field of finance.
- Enhance awareness of the CFA Institute's educational offerings.
- Encourage academic institutions to join the CFA Institute University Affiliate Program.
- Create awareness of CFA Cleveland networking and educational events.
- Maintain relationships with critical staff.
- Participate in related university events.

### ROLES AND RESPONSIBILITIES OF AMBASSADORS

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#### 1 Introducing the CFA Program

- Utilize the CFA Institute's [PowerPoint presentations](#) to share detailed program information with students and faculty.
- Promote the benefits of joining the local [CFA Society](#) for access to mentorship programs, networking events, and professional development opportunities.

#### 2 Promoting the CFA Institute Affiliate Program

- Encourage schools to join the program or, if already affiliated, to maximize their benefits, such as:
  - Ability to award student [scholarships](#) exclusive to Affiliated Universities.
  - Access to free learning resources, including eBooks, curriculum ethics materials, and sample exams.
  - Access to the [Financial Analysts Journal](#) and a wealth of industry research.
  - Networking opportunities with financial professionals, CFA Charterholders, and other affiliated universities.
  - Use of the CFA Institute logo and recognition as an Affiliated University on the CFA Institute website.

#### 3 Sharing CFA Program Information Updates

- Distribute the [student FAQ](#) to universities and students to inform them of important program changes, including the newer policy allowing students to begin taking the exams 23 months before graduation.
- Provide information on the [exams, dates, and fees](#).
- Give an overview of what the [core exam topics](#) consist of.
- Discuss any [changes in the Curriculum](#) for 2024.

#### 4 Disseminating Information About CFA Society Cleveland

- Highlight the Annual Investing in Your Career event and the Annual [Research Challenge](#) competition.
- Encourage participation in the [CFA CLE Discord](#) candidate group for enhanced community engagement and support.
- Encourage participation in CFA CLE [upcoming events](#).

### SUPPORT AND RESOURCES FOR AMBASSADORS

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Ambassadors receive ongoing support from CFA Society Cleveland, including **access to educational materials**, networking opportunities, and **guidance for engaging with academic institutions effectively**.