

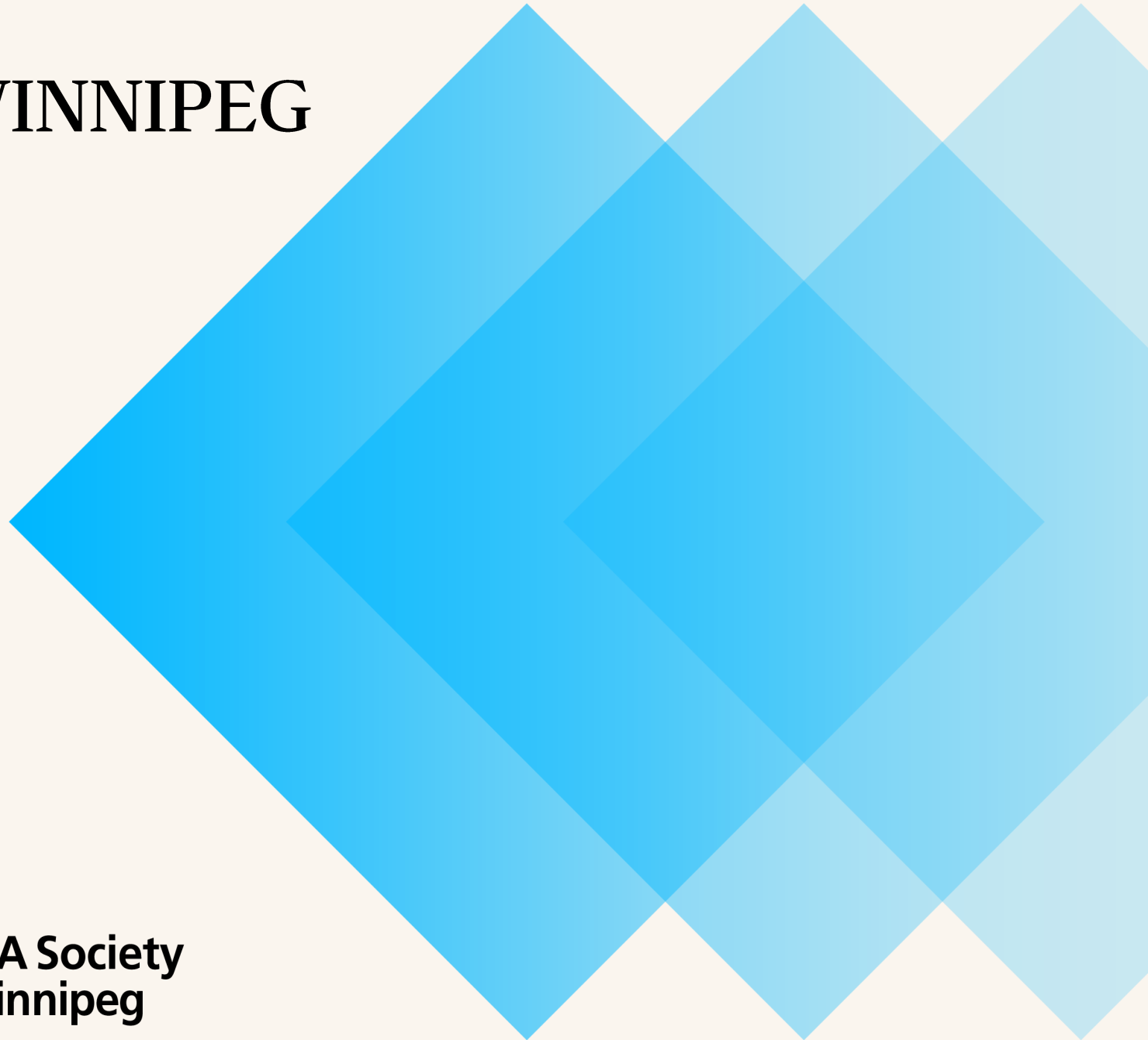
2024 CFA SOCIETY WINNIPEG ETHICS CHALLENGE

PRAIRIES REGION

**Radisson Hotel Winnipeg Downtown
288 Portage Avenue**

**Ambassador Terrace East Ballroom
(Elevator button "T")**

February 2 & 3, 2024



WELCOME!

CFA Society Winnipeg is excited to host the 8th annual local competition with university teams participating from Manitoba and Saskatchewan.

This challenge embodies the mission of CFA Institute by promoting “the highest standard of ethics, education, and professional excellence.”

#CFAEthicsChallenge

FRIDAY, FEBRUARY 2nd SCHEDULE

Meet & Greet Cocktail Reception

Participating teams and invited guests

*Radisson Hotel Winnipeg Downtown Ambassador Terrace East Ballroom
(Elevator button "T")*

5:30 – 8:00 PM

*Attendees will receive 2 complimentary beverage tickets.
Cash bar for additional purchases.*

Assorted complimentary appetizers will be served from 5:30 – 7:30 PM

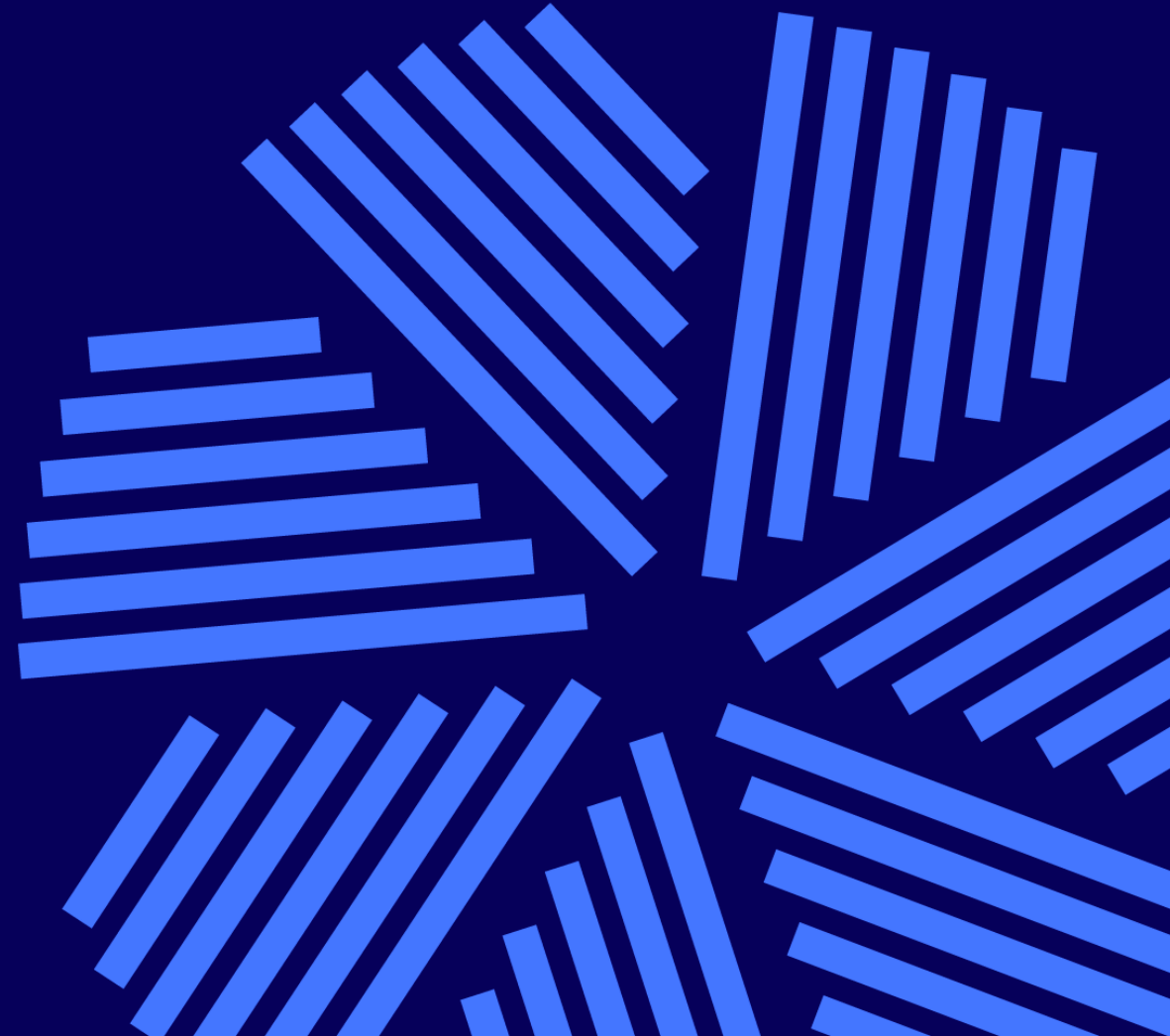
SATURDAY, FEBRUARY 3rd SCHEDULE

Time (CST)	Who	Activity	Room
9:00 AM – 9:30AM	Everyone	Arrive at the Radisson Hotel Winnipeg & check in	Ambassador Terrace Ballroom West
9:45 AM – 9:50AM	Ying Zhang, CFA	Welcome Remarks & Overview/Housekeeping instructions	Ambassador Terrace Ballroom West
9:50 AM – 10:00 AM	Everyone	- All teams go to Holding Rooms - Judges & spectators	- Holding Room - Presentation Room
10:00 AM – 10:30 AM	Team A	10 minute presentation, 10 minute Q&A	Presentation Room – Terrace Ballroom E.
10:30AM – 11:00 AM	Team B	10 minute presentation, 10 minute Q&A	Presentation Room – Terrace Ballroom E.
11:00 AM – 11:30AM	Team C	10 minute presentation, 10 minute Q&A	Presentation Room – Terrace Ballroom E.
11:30 AM – 12:00PM	Team D	10 minute presentation, 10 minute Q&A	Presentation Room – Terrace Ballroom E.
12:00 PM – 12:30 PM	Break	Judges Deliberate	Presentation Room – Terrace Ballroom E.
12:00 PM – 12:15 PM	All Teams	Group Photos	Terrace Ballroom W
12:15 PM – 13:30 PM	Everyone	Buffet Lunch	Terrace Ballroom W
13:15 PM – 13:30 PM	Brendan Hargrave, CFA Ying Zhang, CFA	Winners Announced & Closing Remarks	Terrace Ballroom W
13:30 PM – 13:40 PM	Winners	Photos & follow-up items	Terrace Ballroom W

CFA SOCIETY WINNIPEG ETHICS CHALLENGE

About the Ethics Challenge

- *The first Ethics Challenge was started by a CFA Society Toronto volunteer in 2014.*
- *Summons students to analyze a situation with a "grey" area where right or wrong may not be apparent.*
- *Student teams are given a case study with an ethical dilemma and present their recommendations to a panel of senior charterholders.*
- *A question-and-answer period follows, and a champion is later announced.*
- *10-minute presentation, 10-minute Q&A*



REMINDERS

- Teams are forbidden from identifying their school identity at any point during the presentation.
- Teams will not be allowed to watch other presentations.
- Mute or Power off all mobile devices before the presentations begin
- Teams put significant effort into their presentations and want to present in front of an audience.
- Invited guests may include Society members, University officials, Classmates or Family members



Ethics Challenge

A more ethical investment profession starts here.



PRESENTATION GENERAL

Duration	Activity
2 minutes	<ul style="list-style-type: none">• Competitors enter the Presentation room• Powerpoint presentation will be shared on screen, team conducts brief test
10 Minutes	<ul style="list-style-type: none">• Team Presentation (recorded)
10 Minutes	<ul style="list-style-type: none">• Question & Answer Period by the Judges only (recorded)
5 – 10 minutes	<ul style="list-style-type: none">• Competitors and spectators exit the room• Judging panel completes scorecards• Break as needed

All judges will score using a standard scorecard, marking each team out of 100 possible points.

- *Judges are asked to develop their own baseline and **ensure fairness and accuracy** in their scoring.*

For both Presentation & Q&A Period:

- *Timer will start when the first person speaks (timekeeper will prompt the team)*
- *1-minute remaining verbal warning will be given*
- *Timekeeper says, "Time" at the end of 10 minutes*



CASE OVERVIEW

The mission of CFA Institute is to lead the investment profession globally by promoting the highest standards of ethics, education, and professional excellence for the ultimate benefit of society. The Ethics Challenge fulfills this mission by promoting best practices in the investment profession and preparing students for the ethical dilemmas they may face in their careers.

The case is the central tenant of the Ethics Challenge. The case is developed by the society in conjunction with CFA Institute and incorporates common ethical issues and the application of the CFA Institute Code of Ethics and Standards of Professional Conduct. The purpose of the competition is to prepare students for “real life” ethical dilemmas they may face when entering the investment profession in their region or locale. Teams of three to five undergraduate and/or graduate students create a presentation based on their analysis and present it to a panel of judges. The presentation primarily focuses on violations of the CFA Institute Code of Ethics and Standards of Professional Conduct and recommendations about how these violations should be addressed.

This case was written by Michael G. McMillan, PhD, CFA, CPA, CCEP, Director of Ethics Education, CFA Institute.

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LOCAL COMPETITIONS

Local Competition	Participating Societies
Alberta	Calgary, Edmonton
Atlantic Canada	Atlantic Canada
British Columbia	Vancouver, Victoria, Okanagan
Prairies	Saskatchewan, Winnipeg
Quebec	Québec, Montréal
Ontario	Toronto, Ottawa

- *100+ students from 26 Universities across Canada compete in Local Competitions (late Jan - mid Feb)*
- *One ethics case used across the country*
- *Students have 4 weeks to prepare*
- *One winner from each Local Competition will advance to the National Round*

Event Sponsors



TROPHY AWARDED TO WINNING TEAM

Each member of the winning team from the Local Competition will receive a monetary prize per student and a team trophy.

The 2024 CFA Societies Canada Ethics Challenge – National Round will be held virtually on May 3, 2024, where the finalists from across Canada compete for the national title.

The National Round will also include a student symposium which is open to both competing and all other interested students



CONTACT INFORMATION

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**CFA Society
Winnipeg**

