



STRONGER ETHICS. BRIGHTER FUTURES.

2021 CFA Institute Ethics Challenge

The mission of CFA Institute and its member societies 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 is held at locations around the world to instill strong ethics in the next generation of investment professionals to help them prepare for a successful career.

How does it work?

Teams of 3-5 students (selected by the participating university and advised by a university professor) analyse a case containing a variety of ethical dilemmas faced by investment professionals. Students learn about and apply the *CFA Institute Code of Ethics and Standards of Professional Conduct*.

All competing teams are given the same case and are tasked with identifying and analysing the ethical issues involved, and then formulating solutions and approaches for resolving these issues. Teams may then have the opportunity to present their conclusions to a panel of expert judges for the chance to win the Challenge.

Who can participate?

- Teams consist of 3-5 students. Graduate and undergraduate students are eligible. Each team must have one faculty advisor.
- Students must be enrolled full- or part-time at the participating university at the time of the Challenge.
- Preference will be given to universities that are part of the CFA Institute University Affiliation Program.
- Students who have previously participated in an Ethics Challenge are ineligible.
- Participants must abide by the CFA Institute Code of Ethics and Standards of Professional Conduct.
- CFA® charterholders are ineligible to be team members.

How can you get involved?

Promote the Ethics Challenge to your students and create a team. Faculty members and professors are also invited to volunteer as student mentors/advisors.

Why should you participate?

The Ethics Challenge offers many benefits to the university and your students, including:

- Increases awareness of real-world ethical dilemmas and prepares students for how to handle them.
- Augments classroom learning by combining theory and practice.
- Improves student presentation and teamwork skills.
- Positive public relations and brand exposure for your school.
- Demonstrates the importance of strong ethics to tomorrow's professionals.
- Provides professional networking opportunities for students and faculty.

For more information

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