

Education Advisory Committee Call for Nominations

(Application Deadline for Submission: 1 December 2018)

The purpose of the Education Advisory Committee (EAC) is to identify competencies and trends to ensure the CFA Institute Programs (CFA Program, CIPM Program, and Investment Foundations) remain relevant to the finance industry.

EAC membership terms:

- must be a Regular Member of CFA Institute in good standing;
- will be appointed to a one (1) year term, renewable annually at the discretion of the Board of Governors for a maximum of six consecutive years;
- are appointed as individuals, not as representatives of their employer or other constituent groups;
- are expected to participate in two (2) in-person meetings annually (consisting of 1 1/2-day each) and on conference calls;
- may also be asked to serve from time-to-time on special purpose subcommittees.

Volunteer roles and responsibilities:

- Makes recommendations for development of practice analysis process by which the individual program Bodies of Knowledge (BOK) and competencies are developed.
- Selects BOK sections and competencies to be reviewed each year and sets priorities for the year in collaboration with the curriculum team.
- Assists in development of specialized BOK and competencies.
- Ensures that the CFA Program and other program curricula are in line with practice analysis, individual program BOK and test specifications.
- Provides guidance in the process of managing working body members.
- Collaborate with CFA Institute Strategic Divisions (Member Value and Standards and Advocacy) and leverage practice analysis process to support their strategic objectives.
- Other activities as designated by the CFA Institute Practice Analysis staff and Board of Governors.

Volunteer Experience and requirements:

Members serving as campus finance laboratory leaders with industry experience; Mainland China, India and EMEA based members; and/or professionals with primary expertise in derivatives, fixed income or Fintech; CIPM certificants a plus.

Application Process

Interested applicants should submit an application and resume to the EAC Nominating Committee. The Nominating Committee will hold phone interviews with selected applicants and make their recommendations to the CFA Institute Board of Governors for approval. New members terms will start on 1 May 2019.

Education Advisory Committee Application Form

Part I: General Information

_____ Member Number CFA Charterholder _____ _____ Year Awarded

Name: _____

Address: _____

City: _____ State: _____ Zip: _____ Country: _____

Business Phone: _____

Email: _____

CFA Institute Society Affiliation: _____

Employer: _____

Title/ Job Description: _____

Educational Background: _____

Professional Affiliations: _____

Please list the name and contact information for two professional references:

Reference #1:

Name:

Company:

Email Address:

Reference #2:

Name:

Company:

Email Address:

Part II: Experience/Competency

Describe what you consider to be your area of expertise in the investment profession.

Have you ever been involved with development/teaching of CFA exam preparatory courses or materials?

If yes, please explain: _____

Select your competencies (all that apply;
hold CTRL key to pick multiple)

How many years of experience do you have in the investment industry?

Part III: Commitment to CFA Institute

Participation on this committee requires a significant amount of volunteer time. If selected to serve, would your employer support the time commitment during work hours?

Have you ever participated in any CFA Institute/CFA Society volunteer activities?

If yes, please indicate your capacity and when you served. Please specifically note involvement in the CFA Program, CIPM Program, and/or the CFA Institute Investment Foundations Program.

Have you participated in a volunteer group or committee that has required a significant time commitment?

If yes, in what capacity: _____

What do you think you can contribute to this committee?

Part IV: Additional Comments

Please provide any additional information that you believe will help the Nominating Committee in considering your application. (Please email a copy of your résumé or CV or provide your LinkedIn Profile):

Send Application and Resume by 1 December 2018 to:

Carey Hare

915 E High Street

Charlottesville, VA 22902

Email: carey.hare@cfainstitute.org