



# CFA Institute

## PARTICIPATION AGREEMENT

In consideration of my participation in the CFA Institute Research Challenge (collectively referred to as the “Challenge”) as a student, Industry Mentor, Faculty Advisor, Grader, or Judge (“Participants”), I hereby agree to the following:

### 1. GENERAL

- a) I will abide the Official Rules of the Challenge;
- b) I certify that I do not have any Conflicts of Interest as defined in the Official Rules;
- c) I acknowledge, agree, and, if necessary, consent to the processing of my personal data as described in [the CFA Institute Privacy Policy](#) . I understand that my registration information will be shared with the hosting CFA Institute Member Society or other organizer of my local Challenge event for purposes of enabling them to conduct their portion of the Challenge as well as with third party vendors such as hotels and travel agencies as necessary to arrange for my travel to and accommodations at the Challenge. I understand that if I authorize CFA Institute to do so by opting in, then CFA Institute will share my contact information (name, address and/or email address) with select sponsors and exhibitors of the Challenge. I understand that, where provided by law, I may exercise rights related to my personal data, as described in the “Your Rights” section at the end of the CFA Institute Privacy Policy but that exercise of those rights could prevent me from participating in the Challenge. If I wish to exercise rights related to my personal data held by the hosting CFA Institute Member Society or other organizer of my local Challenge event, I understand I must contact them directly.

### 2. WARRANTY AND RELEASE

- a) I hereby release and forever discharge CFA Institute and all CFA Institute Member Societies (“Societies”), and their successors, directors, officers, employees, agents, members, volunteers and assigns, of and from any and all claims, causes of action, obligations, demands and liabilities whatsoever, of every name and nature, both in law and at equity, known and unknown, arising from or in connection with my participation in the Challenge. Participation in any non-CFA Institute sponsored activities is at my own risk.
- b) I warrant that my presentation and written materials are my original work, that publication will not infringe on the rights of others, and that I have obtained permission to use any third-party materials.

### 3. COPYRIGHT AND RIGHT OF PUBLICITY

- a) CFA Institute shall own the copyright in all materials prepared by and for Participants in connection with the Challenge, including Reports.
- b) Students may distribute research reports prepared by their team in connection with the Challenge to potential employers and institutions of higher education for the purpose of career advancement. University advisors may use reports prepared by their teams in connection with their normal teaching duties.
- c) I agree not to distribute any Reports publicly unless I receive prior written permission from CFA Institute.
- d) I hereby grant CFA Institute, Societies and any other organizer of my local Challenge event permission to photograph and/or record me during my participation in the Challenge, and to use my name and likeness in connection with its promotion and administration of the Challenge and for other CFA Institute business.

This Agreement shall benefit CFA Institute, Societies, and their successors, assigns, licensees, and contractors.



# CFA Institute

Agreed:

Signature: \_\_\_\_\_

Print Name: \_\_\_\_\_

Local Challenge: \_\_\_\_\_

University/Employer: \_\_\_\_\_

Date: \_\_\_\_\_