



STUDENT MEMBERSHIP

OUR MISSION

The mission of the CFASSD is to serve the needs of professionals in the investment decision making process by providing a forum for the exchange of information and ideas among its members, by enhancing members' investment knowledge, and by encouraging high ethical standards and professional conduct among all participants in the investment industry.

WHO WE ARE

The CFA Society of San Diego was founded in 1962 as the Financial Analysts Society of San Diego, Inc. to promote a high standard of ethics and sound professional standards of investment management and research, and to enhance professional knowledge and skills. The Society was admitted to the Association for Investment Management and Research (AIMR) on November 4, 1963. In May 2004, AIMR became CFA Institute and in May 2005, the Society changed its name to CFA Society of San Diego (CFASSD), in order to more closely align with the CFA Institute and the Chartered Financial Analyst (CFA®) designation.

There are approximately 425 members of the CFASSD, including security analysts, portfolio managers, bankers, and other investment professionals. Approximately 350 CFASSD members hold the Chartered Financial Analyst designation, and many others are currently candidates for this professional designation.

The CFASSD sponsors luncheons with presentations by top management of companies, educational seminars and workshops, and programs on economics, capital markets and other topics of current interest to the investment community.

BENEFITS OF THE CFASSD STUDENT MEMBERSHIP

CFASSD Student members are invited to utilize virtually all of the resources provided to the Society's Regular members. Benefits include:

- ♦ CFA exam scholarship, mentoring, and internship opportunities offered exclusively to Student members through the CFASSD SEMI program.
- ♦ Discounted rates on CFASSD presentations, corporate events, and professional development programs.
- ♦ Networking events hosted by CFASSD specifically for Student members.
- ♦ Access to CFASSD job postings and student member directory.
- ♦ Information about the CFA® program and the CFASSD resources available to students pursuing the CFA charter.



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THE SEMI PROGRAM: A PARTNERSHIP IN CAREER DEVELOPMENT

The CFASDD Scholarship, Education, Mentoring, and Internship (SEMI) program is a unique opportunity for undergraduate and graduate students to find financial support for the pursuit of the CFA charter and develop an understanding of how academic concepts are applied by investment professionals in a real world setting. Features of the program include:

- ♦ 3 annual scholarships awarded to students with exceptional academic performance and a demonstrated passion for the investment industry covering the costs of CFA exam enrollment and registration fees (up to a \$1,395.00 value).
- ♦ 2 annual scholarships for CFA exam preparation materials provided by Schweser, a leading provider of education solutions.
- ♦ Access to professional mentors. Students will gain insight into potential career paths and receive interview coaching and resume review.
- ♦ Graduate and undergraduate level internship opportunities at local investment management firms.
- ♦ An Annual Investment Challenge designed to educate students on portfolio construction and stock selection. Winners of the competition have the opportunity to advance to a regional event in which they will be mentored by industry professionals in creating a research report on a pre-selected public company.

STUDENT MEMBERSHIP ELIGIBILITY

CFASDD's Student Membership is available to those who are matriculating toward a bachelor's or master's degree in finance, business, or a discipline related to the investment decision-making process at an accredited college/university and maintain at least a 3.0 grade point average.

Student Membership is only available to individuals who do not qualify as Regular or Affiliate members and meet the following criteria:

- ♦ Full-time undergraduate students pursuing a bachelor's degree in business, finance, or discipline related to the investment decision-making process.
- ♦ Full- or part-time graduate students pursuing an MBA or a master's degree in a business-related major. Part-time students must be enrolled in at least six credit hours per semester.
- ♦ All students must have and maintain a minimum 3.0 GPA and be in good standing in their school's academic program.

Student membership expires one year after graduation or after the student discontinues studies toward a degree in finance, business, or discipline related to the investment decision-making process

Annual student dues are \$50.



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CFASSD STUDENT MEMBERSHIP GROUPS

CFASSD Student Membership Groups are currently active (and recruiting) at the following San Diego Universities. Please contact the Faculty Sponsor listed below for more information.

University of California, San Diego (UCSD)
Faculty contact: Professor Allan Timmermann,
Ph.D.
Email: agtimmermann@ad.ucsd.edu

University of San Diego (USD)
Faculty Contact: Professor Dennis Zocco, Ph.D.
Phone: 619-260-4848
Email: dzocco@sandiego.edu

University of California, San Diego (UCSD)
Faculty Contact: Michael Willoughby
Phone: (858)534-2518
Email: mwilloughby@ucsd.edu

San Diego State University (SDSU)
Faculty contact: S.G. Badrinath (Badri), Ph.D.
Phone: 619-594-4749
Email: S.Badrinath@sdsu.edu

For more information about CFASSD Student Memberships, please contact:
CFA Society of San Diego Contact
Michael Blasi, CFA
University Relations Chair
Phone: (858) 793-2420
Email: universityrelations@cfassd.org