



## STUDENT MEMBERSHIP FACT SHEET

### PREPARE FOR YOUR FUTURE WITH A CFA CHICAGO STUDENT MEMBERSHIP

Qualified students can enjoy most of the benefits and privileges of a Regular CFA Chicago Society Membership at a greatly reduced rate! Join CFA Chicago now as a Student Member, and jumpstart your career by building the practical skills, contacts and knowledge that will make you the candidate companies want to hire!

### WHAT IS THE CHARTERED FINANCIAL ANALYST (CFA) DESIGNATION?

First awarded in 1963, the CFA charter has become known as the gold standard of professional credentials within the global investment community. Employers and investors recognize the CFA designation as the definitive standard for measuring competence and integrity in the fields of portfolio management and investment analysis. The CFA Program is comprised of 3 levels - each culminating in an exam. One must pass each level sequentially and fulfill other requirements of the program before earning the right to use the CFA designation.

### WHAT IS CFA SOCIETY OF CHICAGO?

The CFA Society of Chicago is the oldest investment analysts society in America, bringing together nearly 4,000 of the top professionals directly involved in investment analysis, including investment research analysts, investment counselors, portfolio and pension managers, economists, and educators. The talent and integrity of our members is recognized throughout the investment community, with the expertise and dedication of our members being sought by both institutional and individual investors across the full range of economic and financial issues. CFA Chicago is currently the 6th largest financial analysts society in the world.

### BENEFITS FOR STUDENTS

Membership provides you with opportunities for practical experience (think resume!) as well as access to valuable insight from industry experts (think networking!):

- Preferred Student-Member rate of \$10 for most CFA Chicago Luncheons, Career and Social Events;
- Access to CFA's Member-only Website, featuring:
  - CFA Community (members-only social networking platform);
  - Job Posting Board featuring Student Internships;
  - Member Directory;
  - Resources for Students;
- Opportunity to serve as a Volunteer on any Advisory Group;
- "The Efficient Frontier," CFA Chicago's Quarterly Newsletter;
- Countless Networking Opportunities with top players in the industry.

### NEW ADDED BENEFITS FOR CURRENT CANDIDATE STUDENT-MEMBERS:

- Eligible to apply for Kimberly Paige Memorial Study Scholarship (includes interactive, Instructor-led Lectures, Lecture Notes, Study Guides, Practice Exams, PassMaster Drilling and Homework Software, and unlimited email access to a Personal Tutor who is a CFA Charterholder. Program also includes Mock Exam and Review Seminar and Flashcards -- total value of \$1490 per course (retail price));
- Discounts available for Kaplan Schweser Preparatory Courses for CFA Exam;
- Assistance through Study Groups to better prepare for the CFA Exam;
- Access to free CFA Mock Exam (in partnership with Kaplan Schweser) and Discount on Mock Exam Review.

## STUDENT MEMBERSHIP

The CFA Society of Chicago's Student Membership is offered to (i) **undergraduate students, enrolled *full-time*** in a university/college, pursuing a bachelor's of art or bachelor's of science degree and (ii) **graduate students, enrolled *full or part-time***, pursuing a master's degree. Phd students are also welcome to apply.

A student member who does not maintain the prerequisite college/university enrollment criteria will no longer be eligible for student membership. Once ineligible for student membership, an individual may remain as a student member until the end of the student membership year for which dues has been paid.

The CFA Society of Chicago Student Membership is valid for one-year and must be renewed annually. The membership year runs from July 1st through June 30th of the following year. Student membership dues are \$60 a year and are not pro-rated.

Student members of the CFA Society of Chicago have access to the CFA Society of Chicago website ([www.cfachicago.org](http://www.cfachicago.org)), including job postings, receive CFA Society of Chicago newsletters and event notification, and may attend many CFA Society of Chicago events for a student-member rate of \$10. (Student-members will be eligible for the regular member rate for events do not qualify for the \$10 rate).

Student Membership in the CFA Society of Chicago does not qualify an individual for membership in the CFA Institute or for future Regular or Affiliate membership in the CFA Society of Chicago.

## STUDENT MEMBER APPLICATION PROCESS

To be accepted for membership, an applicant is required to (i) submit the Student Membership Application, *which must be signed by a Professor of finance, business or economics at the college/university at which the student is enrolled or by a CFA Chicago Charterholder member*, (ii) prepare and submit a typewritten, original **200-500 word** essay on the importance of ethics in the conduct of business in the global economy, (iii) enclose a copy of the applicant's current student ID card, (iv) enclose \$60 membership dues, payable by check (made out to The CFA Society of Chicago), money order, or credit card, and (v) agree to be bound by The CFA Society of Chicago's Code of Ethics.

To maintain a student membership, renewing student members must submit a Student Membership Renewal Application affirming their student status, along with \$60 membership dues and an updated copy (as applicable) of their student ID.

Student Membership Applications are processed at each month-end by the CFA Society of Chicago Recruitment Advisory Group, with recommendation for approval by the Board of Directors

**THANK YOU FOR YOUR INTEREST IN JOINING THE CFA SOCIETY OF CHICAGO AS A STUDENT MEMBER!**

CFA Society of Chicago  
134 N. LaSalle St., Suite 1740  
Chicago, IL 60602  
P: 312-251-1301  
F: 312-251-1303

[info@cfachicago.org](mailto:info@cfachicago.org)  
<http://www.cfachicago.org/>