

Student Membership Application

Criteria:

To be considered for Student Membership in the CFA Society Austin, the following criteria must be met:

- be enrolled in a university/college as one of the following
 - I. a full-time undergraduate student pursuing a bachelor's or art or bachelor's of science degree
 - II. a university/college as a full- or part-time graduate student pursuing a master's degree or Ph.D.
- agree to be bound by the CFA Institute *Code of Ethics and Standards of Professional Conduct*.

CFA Institute membership is not required for Student Membership in the CFA Society Austin. An individual may be a Student or Candidate member of the CFA Society Austin for a combined maximum of three years.

Application:

Applicants are required to submit the following documents and payment in order to be considered for student membership:

- completed Student Membership Application, signed by a Professor of Finance, Business or Economics at the college/university where the students is enrolled.
- copy of current unofficial transcript or class schedule
- 200-500 word essay on importance of ethics in the conduct of business in the global economy
- \$50 annual membership dues (credit card or check payable to CFA Society Austin). Dues are not pro-rated.

Section A. How did you hear about the CFA Society Austin Student Membership?

CFA Society Austin website
Student Organization
CFA Member
Research Challenge
Professor
Other _____

Section B. Professor Authorization:

I, _____, a professor of _____ (subject area) hereby recommend this student for membership in CFA Society Austin. I certify that this student is enrolled in good standing at _____ (name of college/university).

Signature of Professor _____ Date _____

Section C. Applicant Information:

Name _____
LAST FIRST M.I.

Address (current) _____

City _____ State _____ ZIP _____

Address (permanent) _____

City _____ State _____ ZIP _____

Email _____ Phone (_____) _____ - _____

Gender: Male Female D.O.B. ____/____/____
mm dd yyyy

College/University _____

Program of Study (Major, Degree)

Expected Graduation Date ____/____/____ Status: Full Time Part Time

Section D. Essay Question:

Regular and Affiliate Members of the CFA Society Austin must understand and comply with all applicable laws, rules and regulations (including the CFA Institute Code of Ethics and Standards of Professional Conduct) of any government, regulatory organization, licensing agenda, or professional association governing their professional activities.

Please submit an original, typewritten essay of 200-500 words that describes the importance of ethics in the conduct of business in the global economy. Please attach this essay to the application.

Section E. Payment:

Note: if your application is not accepted, your dues will be refunded.

- 1) You can pay from an Invoice that will be generated by the Treasurer and allows use of a major credit card

OR

- 2) You may enclose a check in the amount of \$50 made payable to CFA Society Austin

Section F. Applicant Statement:

I, _____, hereby affirm that I meet the criteria for student membership and I have attached a copy of my current unofficial transcript or class schedule.

I assert that the typed essay included with this application is my own original work.

I understand that Regular and Affiliate members of the CFA Society Austin must act with integrity, competence, diligence, respect, and in an ethical manner with the public, clients, prospective clients, employers, employees, colleagues in the investment profession, and other participants in the global capital markets. I understand that CFA Society Austin expects me, as a Student Member, to follow these same guidelines in my academic and professional life.

I agree to comply with all the applicable rules, bylaws and dues assessments.

Signature

Date

Completed application should be sent to:

CFA Society Austin

Fax: 888-425-3331

email: Admin@cfaaustin.org