



2019-2020 VOLUNTEER APPLICATION

P.O. Box 928456 | San Diego, CA 92192-8456
619.684.6228 | Email: staff@sandiego.cfasociety.org

Thank you for your interest in volunteering with the CFA Society San Diego.

Please **scan and email** the completed and signed form to staff@sandiego.cfasociety.org.

Contact Information

Name (Last, First, Middle):

Mailing Address:

City: State: Zip:

Firm Name: Title:

Cell Phone: E-mail:

of Years in the Investment Industry

of Years as a CFA Charterholder

Are you currently a CFA Society San Diego member? No Regular Member Affiliate Member

Professional Designations

(e.g. CFA, CFP, CMT, CPA, etc.):

Education Record

Undergraduate University:

Graduate University:

Areas of Interest for Volunteering with the San Diego Society

I am interested, and able, to volunteer for a: single-year project multi-year project with the society.

I am a CFA Charterholder, CFASSD society member and interested, and able, in taking a leadership role.

PROGRAMS VOLUNTEER Help our educational programming with your strong industry connections to great speakers.

COMMITTEE VOLUNTEER Understudy with an existing Board chair. Opportunities are available for the following chairs:

I am interested in (check one or more): Membership University Research Challenge Treasurer Education

UNIVERSITY OUTREACH Inspire the next generation by conducting info sessions at area universities a couple times a year.

SPONSORSHIP VOLUNTEER Skilled at business development? You could help CFA San Diego execute on these efforts better.

PHOTOGRAPHER VOLUNTEER Is amateur photography one of your hobbies? Would you want to hone your skills at our events?

SOCIAL MEDIA VOLUNTEERS Our LinkedIn and Facebook accounts can always use more content and engagement.

Availability

- One or two meetings or events per year Board Level – 5 to 15 hours per month on-going
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- Initiate and participate in a short project (a few meetings within a few months)
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- Initiate and participate in a long-term project (several meetings during the year)
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Conditions of Agreement

- **Conflicts of Interest.** Volunteers agree to avoid actual or potential conflicts of interest in their involvement with CFASSD. A conflict of interest may exist when you or a member of your family are involved in activities that may impact your ability to assist CFASSD fairly and impartially. A conflict could be actual or perceived and could result in personal or professional gain for that volunteer or persons close to them.
- **Public Statements/Political Involvement.** Volunteers should not speak on behalf of CFASSD unless specifically authorized by CFASSD. Volunteers are free to engage in individual political activity but such activity should be completely disassociated from their position as a volunteer of CFASSD.
- **Confidentiality and Information Security.** Volunteers may at times have access to confidential information. Confidential Information includes all confidential and proprietary information or trade secrets of CFASSD, including but not limited to member and candidate data. As a volunteer, you agree that you will not disclose to third parties or use for any purpose outside of CFASSD, any confidential information of CFASSD.
- **Invention Assignment.** A volunteer may be asked to create works of authorship, documents or other related works for the benefit of CFASSD. You agree and understand that all works, created during your volunteer assignment and which are within the scope of CFASSD, belong solely to CFASSD and you assign all rights to such works to CFASSD.
- **Conduct.** CFASSD is proud of its professional and congenial work environment and seeks to ensure that the environment remains pleasant for all who work here. Volunteers are expected to treat each other and CFASSD staff with courtesy, consideration and professionalism. Harassment for any discriminatory reason is strictly prohibited.
- **Travel.** Volunteers may be asked to travel on behalf of CFASSD. You agree that all travel will occur within the guidelines set forth in the CFASSD Travel Policy.

Agreement

I acknowledge that I have read, understand and agree to comply with this Volunteer Acknowledgement and all applicable policies. I further understand that my services for CFASSD are being rendered in a volunteer-capacity and will not be compensated.

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| Signature: | Date: |
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