



Mission & Vision

The Student Ambassador Program is a CFA Society San Francisco initiative, designed to empower motivated finance students to serve as leaders, advocates, and connectors within their university communities. Ambassadors will actively engage with their peers through the online student community group, creating prompts and discussions that foster collaboration and professional development. They will play a key role in on-campus outreach and support the planning and execution of on-campus events, the annual Northern California CFA Institute Research Challenge, and a Society Career Event in the Fall.

Program Structure

The program will consist of no more than 2 Student Ambassadors from each participating university, with (1) Program Chair - who will also serve on the Society University Relations Council (URC) ex-officio - and (1) Vice Chair. Ambassadors will nominate a successor for consideration in the program annually. Oversight of the program will be led by Society staff members, as necessary. Ambassadors shall reflect the diversity of the membership in terms of culture, perspective, ideas, gender, age, and expertise.

Key Responsibilities

Program Chair and Vice Chair

- Oversee the program's operation.
- Must be present for all Ambassador meetings.
- Serve on the University Relations Council (URC), which meets monthly.
- Ensure Ambassadors are supported and engaged.
- Monitor progress and completion of action items.
- Respect Society guidelines and timelines for programming.
- Meet with Society staff as necessary.
- Create meeting agenda and distribute notes.

Student Ambassadors

- Coordinate with Society staff to source participation student events such as the Research Challenge, on-campus events, and Career Event.
- Moderate and participate in the online Student Member community, encouraging active participation.
- Act as a bridge between students and the Society, facilitating meaningful engagement with the CFA Program and the broader finance industry.
- Provide insight on student needs and resources.

Meeting Frequency & Format

Student Ambassadors will meet monthly for 45-minutes, led by the program chair. Meeting dates and times will be set in August. A Society staff member will facilitate all meetings and manage the calendar, while the program chair is responsible for leading the meeting.

Terms

Student Ambassadors will serve a one-year terms and shall serve no more than two (2) years. Sitting members are encouraged to ascend to chair roles and nominate their successor for consideration in the program.

Program Criteria

- Must join as a Student member of the Society.
- Must be currently enrolled at a university in Northern California.
- Must have completed at least (1) year of higher education with an interest in a career in finance.
- Must commit to an initial 1-year term.
- Must commit to attending monthly virtual program meetings.

Student Ambassador Responsibilities

- Must attend the virtual Annual Leadership training in August.
- Complete the Volunteer Agreement.
- Promote and attend on-campus University events in their geographical footprint.
- Moderate and participate in the online Student Member community.

Selection Process

Applications for the Student Ambassador Program may be submitted year round with the deadline for consideration closing on September 30 at 5pm PT. Once the application window closes, Society staff will schedule and conduct interviews throughout September and October.