

## Hartford Society of Financial Analysts Job Description

### *Continuing Education Committee Chair*

#### **General Purpose:**

- Facilitate administration of Stalla CFA exam review courses.
- Serve as resource for candidates and prospective candidates regarding questions about the CFA program.
- Administer Society scholarship program.

#### **Major Functions:**

- Coordinate with Stalla to publicize upcoming workshops, course descriptions and registration deadlines; primarily via broadcast emails.
- Occasionally appear at the beginning of Stalla workshops to promote the CFA program, the HSFA and the Stalla CFA review course.
- Occasionally act as liaison between Stalla and review course instructors.
- Respond to candidate's and prospective candidate's questions regarding the CFA program, review courses and scholarship program.
- Inform interested candidates of the requirements and procedure for the Society scholarship program.
- Assemble necessary paperwork from scholarship candidates for Board consideration regarding scholarship award. Complete Society documentation and submit to CFA Institute along with approved scholarship applications.

#### **Time Commitment:**

- Generally less than one hour a week.
- More time may be required when promoting review programs and workshops and when reviewing scholarship applications (concentrated around semi-annual scholarship deadlines).
- Ad hoc time commitment to respond to candidate or potential candidate questions or solicitations from other test prep providers or finance educators in the area.

#### **Key events and Dates:**

<b>Key events</b>	<b>Date</b>	<b>Details</b>
Scholarship deadlines for submission to Society	Feb 1 Aug 1	The Society typically requires two weeks before CFA Institute deadline to receive and review scholarship applications
Submit scholarship winners' paperwork to CFA Institute	Feb 15 Aug 15	CFA Institute deadlines are typically mid-August and mid-February for receipt of completed scholarship application packages for the December and June exams, respectively.
Stalla workshop support	Jan June possibly March	Stalla typically holds workshops in Hartford 2-3 times a year to promote their CFA course offerings. Broadcast emails are sent out and the Education Chair may attend the beginning of a workshop to endorse it.
Stalla mock exams	Nov May	Stalla typically conducts mock CFA exams as it gets closer to exam time. These are announced with broadcast emails.