

# CFA INSTITUTE RESEARCH CHALLENGE

[www.cfainstitute.org/researchchallenge](http://www.cfainstitute.org/researchchallenge)

## Atlanta Society of Finance and Investment Professionals and CFA Societies of Alabama and South Carolina host CFA Institute Research Challenge

### Students to compete for place in Regional Final in Seattle

Alpharetta, GA (January 30, 2017) – The Atlanta Society of Finance and Investment Professionals and The CFA Societies of Alabama and South Carolina are bringing together finance students from many of the top colleges and universities from the states of Alabama, Georgia and South Carolina to compete in the CFA Institute Research Challenge Southern Classic on February 18, 2017 at Kennesaw State University.

The hosts of the event are members of the CFA Institute – the global association of investment professionals made up of portfolio managers, investment analysts and advisors, educators and other financial professionals – will hold the local level of this global competition. During the Kennesaw round, teams of three to five students from the area's leading universities and business schools will compete for a place in the regional final in Seattle, Washington the week of April 6, 2017 where they will meet other teams from around the world. The successful team will then compete in the Global Final in Prague.

Universities competing in this regional event are: Auburn University at Montgomery, Clemson University, College of Charleston, Furman University, Georgia Institute of Technology, Georgia State University, Kennesaw State University, Mercer University, Samford University, University of Georgia, University of South Carolina, and The University of West Alabama.

The CFA Institute Research Challenge offers students the unique opportunity to develop and present an equity research report and compete on a global basis. Students will learn from leading industry experts and their mentors and peers from the world's top business schools. This annual educational initiative is designed to promote best practices in equity research among the next generation of analysts through hands-on mentoring and intensive training in company analysis and presentation skills.

The 2016 global competition, attracted more than 4,250 students from over 925 universities in 76 countries. Over 3,500 industry experts volunteered from 133 CFA Member Societies.

The CFA Institute Research Challenge comprises:

- **Analysis of a publicly-traded company**  
Teams research a publicly traded company. The company's management presents information to the student teams and is available to answer student questions.
- **Mentoring by a professional research analyst**  
Each team works with a CFA charterholder who mentors the team during the research process and reviews and critiques its report.

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- **Writing a research report**  
Each team produces an Initiation of Coverage report on its chosen company. The report is reviewed and scored by a group of judges.
- **Presentation of research to a panel of experts**  
The teams' final presentations are locally evaluated by panels of experts from top financial institutions. Panelists include heads of research, portfolio managers, and chief investment officers from the world's top firms. The team with the highest combined written report and presentation score is the winner and advances to the regional level of the Research Challenge.
- **Advancement to the CFA Institute Research Challenge Global Final**  
Regional winners then progress to compete at the Global Final. At the regional and global stages of the Research Challenge, teams are evaluated solely on their presentations.

For more information visit the [CFA Institute Research Challenge website](http://www.cfainstitute.org/researchchallenge).

## **About the Atlanta Society of Finance and Investment Professionals**

The Atlanta Society of Finance and Investment Professionals was founded in 1960 to serve the practitioners' need for specialized knowledge, advanced studies, and information on new developments in investments and financial management. Of equal importance has been its mission to promote high standards of professional conduct among its members. For more than 55 years, these objectives have guided the society and its membership, and the society now plays a vital role within the Atlanta investment community. Nationally, the society is a member of the CFA Institute. Admitted to membership in 1961, Atlanta is now among the largest of the more than 135 CFA Institute member societies and affiliates, and its members serve as leaders in CFA Institute. The society has twice hosted the CFA Institute annual conference, in 1968 and 1996. [Asfip.org](http://Asfip.org)

## **About the CFA Society of South Carolina**

The CFA Society of South Carolina is an association of 65 local investment professional members. Consisting of portfolio managers, security analysts, investment advisors, and other financial professionals, the society promotes ethical and professional standards within the investment industry, encourages professional development through the CFA Program and continuing education, facilitates the exchange of information and opinions among people within the local investment community and beyond, and works to further the public's understanding of the CFA designation and investment industry. As one of CFA Institute member societies, the society connects members to a global network of investment professionals.

## **About the CFA Society of Alabama**

The CFA Society Alabama is an association of local investment professionals. Consisting of portfolio managers, security analysts, investment advisors, and other financial professionals, the society promotes ethical and professional standards within the investment industry, encourages professional development through the CFA Program and continuing education, facilitates the exchange of information and opinions among people within the local investment community and beyond, and works to further the public's understanding of the CFA designation and investment industry. As one of CFA Institute member societies, the society connects members to a global network of investment professionals.

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## **About the CFA Institute Research Challenge**

Local CFA Institute volunteers work in conjunction with participating local universities to assemble teams of 3–5 business and finance students. Each team works directly with a mentor to research and prepare an equity research report on a publicly traded company.

Each team's findings are locally evaluated by high-profile panels of heads of research, portfolio managers, and chief investment officers from some of the world's top firms. Local champions advance to regional competitions in the Americas, Asia Pacific, and EMEA, and then to the global final.

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## **About CFA Institute**

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. The end goal: to create an environment where investors' interests come first, markets function at their best, and economies grow. CFA Institute has more than 113,000 members in 140 countries and territories, including more than 100,000 CFA charterholders, and 144 member societies. For more information, visit [www.cfainstitute.org](http://www.cfainstitute.org). (Bloomberg users can find CFA Institute at 497458Z.)

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