



**PUTTING ETHICS  
AT THE HEART OF  
EVERYTHING WE DO**  
2023 Ethics Invitational



Ethics plays a vital role in shaping and strengthening the investment profession. Ethical dilemmas do not always have a simple answer that is “right” or “wrong.” They can be damaging to a professional's career if they are not prepared for the challenges that may test personal values and a commitment to doing the right thing.

The Ethics Invitational is designed to help prepare the next generation of investment professionals to face real-world ethical dilemmas by raising their awareness of professional ethics, with emphasis on the CFA Institute’s Code of Ethics and Professionals Standards. It provides an opportunity for teams to develop and exercise ethical decision-making skills.

Form your team and give your students the opportunity to participate with their peers from other universities and colleges across Florida.

**2022 Participation**  
**9 Florida Universities  
and Colleges**  
**35 Students**  
**4 Industry Mentors**



## How the Invitational Works

CFA Society Tampa Bay, in collaboration with the other CFA Societies throughout Florida, works with universities to assemble teams of three (3) to five (5) undergraduate and/or graduate students. Teams will be given a case and must prepare a 5-minute video with their ethical analysis and recommendations demonstrating their understanding and application of ethical concepts to a professional situation.

## Benefits of Participation

- Showcase your university of a statewide scale
- Augment classroom learning
- Give students practical training with ethical issues
- Network with professionals, peers from other universities and others in the community
- Elevate your school's reputation and standing against competing schools

## Who is eligible to compete?

Both undergraduate and graduate students who have not previously participated in an CFA Society Tampa Bay Ethics Invitational.



## What's the Invitational Timeline?

**Dec 1, 2022 – Jan 31, 2023**

Faculty Advisors return commitment to participate to [CFA@CFATampaBay.org](mailto:CFA@CFATampaBay.org)

**Feb 1, 2023**

2023 Ethics Invitational Case Released to Faculty Advisors

**Feb 1, 2023 @ 2:00 PM (ET)**

Briefing for Team Members, Faculty Advisors, Industry Mentors

Register for this briefing by visiting [CFATampaBay.org/2023-Feb-1-Briefing](https://CFATampaBay.org/2023-Feb-1-Briefing)

**Feb 6, 2023 @10:00 AM (ET)**

Briefing for Team Members, Faculty Advisors, Industry Mentors

[CFATampaBay.org/2023-Feb-6-Briefing](https://CFATampaBay.org/2023-Feb-6-Briefing)

**Mar 10, 2023 by 5:00 PM (ET)**

Team video submissions due

**Mar 25, 2023**

Finalists Announced

Top four (4) teams move on to the final round

**Apr 4, 2023 @ 5:00 – 7:00 PM (ET)**

2023 Ethics Invitational Event



## How can I get involved?

You can organize a team to represent your university or college. Promote the event to your students and field your best team and then prepare them to participate.

Register and participate in one or both of the briefings for Team Members and Faculty Advisors.

To register for February 1 Briefing visit [CFATampaBay.org/2023-Feb-1-Briefing](https://CFATampaBay.org/2023-Feb-1-Briefing)

To register for February 6 Briefing visit [CFATampaBay.org/2023-Feb-6-Briefing](https://CFATampaBay.org/2023-Feb-6-Briefing)