



CFA Society Tampa Bay

ASSOCIATE APPLICATION STUDENT

Each application is reviewed by the Board of Directors. Applicants are required to submit all of the following information in order to be considered for acceptance as a Student Associate: **Completed application along with an original typewritten 200-500 word essay on the importance of ethics in the conduct of business in the global economy and \$50 annual dues (check payable to CFA Tampa Bay).**

Annual dues period for CFA Society Tampa Bay is from July 1 through June 30. Dues are not pro-rated.

Section A. Applicant Information

Name _____
LAST FIRST M.I.

Home Address (current) _____

City _____ State _____ Zip _____

Email _____ Phone (_____) _____ - _____

Program of Study (Major, Degree) _____

Expected Graduation Date _____ Student Status Full Time Part Time

Gender: Male Female D.O.B. ____/____/____
MM DD YYYY

Section B. Professor Authorization

I, _____, a Professor/Associate Professor, hereby recommend this student as a Student Associate in CFA Society Tampa Bay. I certify that this student is enrolled and in good standing at _____ (name of college/university).

Signature _____ Date _____

Section B. Applicant Statement

I, _____, hereby affirm that I meet the criteria for student associate and I have attached a copy of my valid, current student ID.

I assert that the typed essay included with this application is my own original work.

I understand all Student Associates of CFA Society Tampa Bay must act with integrity, competence, diligence, respect, and in an ethical manner with the public, clients, prospective clients, employers, employees, colleagues in the investment profession, and other participants in the global capital markets.

I understand that a Student Associate in the CFA Society Tampa Bay does not qualify an individual for membership in the CFA Institute.

I agree to comply with all applicable rules, bylaws and dues assessments.

Signature _____ Date _____

Section C. Essay Question

The purpose of the essay question is that associates of CFA Society Tampa Bay must understand and comply with all applicable laws, rules and regulations (including the CFA Institute Code of Ethics and Standards of Professional Conduct) of any government, regulatory organization, licensing agenda, or professional association governing their professional activities.

Please submit an original, typewritten essay of 200-500 words that describes the importance of ethics in the conduct of business in the global economy. Essay must be attached this essay to the application. For reference, please review the Code, Standards and Guidelines area at www.CFAInstitute.org.

Section D. Payment

Please enclosed the completed application along with your check for \$50 made payable to CFA Tampa Bay and mail to:

**CFA Society Tampa Bay
12157 W. Linebaugh Ave #312
Tampa, FL 33626-1732**

Application Check List

- Completed Application
- 200 – 500 word original essay describing the importance of ethics in the conduct of business in the global economy
- Check for \$50 made payable to CFA Tampa Bay