

CFA Institute Research Challenge–Kansas City Timeline

Late August 2017	Schools introduce concept to potential university participants
Early-September 2017	Ethics panel online learning modules (students watch on own) Ethics Course Module 2: Standard II – Integrity of Capital Markets Ethics Course Module 2: Standard III – Duties to Clients Ethics Course Module 2: Standard VI – Conflicts of Interest Ethics Course Module 2: Standard VII – Responsibilities as a CFA Institute Member or CFA Candidate http://www.cfainstitute.org/community/challenge/prepare/Pages/index.aspx
Mid-Late September	Listen to audios/watch videos on “Doing The Research” (see link above)
September 27, 2017	University teams of 3-5 and resumes must be selected and specified information must be submitted to Laurian Lytle at laurian@lytlemail.com by 5 PM
October 7, 20167	Kick-Off Meeting at Bloch Management Building (Location to be confirmed) Subject company announced and mentors assigned <i>(University teams and faculty advisors must attend)</i> 10:00 AM – 12:30 PM (Breakfast starts at 9:20 AM)
Early October 2017	“How to Write a Research Report – A Sell Side Perspective” “How to Write a Research Report – A Buy Side Perspective”
October 21, 2017	Students and faculty advisors must register (instructions will be sent in a separate document.
November 9, 2017	Subject Company Presentation 5:30-7:30 PM; Location TBD
December 2017	Teams will be allowed one follow-up contact with the Subject Company, arranged through the Challenge; details to follow
December 19, 2017	5:00 PM Draft of Written Report due to Laurian Lytle (she will send on to mentors)
January 25, 2018	5:00 PM Final reports submitted to Laurian Lytle for evaluation by graders (in pdf format, one copy without the university name and one copy with the university name)
February 13, 2018	10:00 PM Deadline to submit PowerPoint Presentation (not prezi) to Laurian Lytle via email
February 17, 2018	Final Oral Presentations by Top 5 Teams at location TBD 10:00 AM – 1:30 PM Potential afternoon event as well
March 19-20, 2018	Americas Regional Finals in Boston, Massachusetts
April 20, 2018	Global Final in Seoul, Korea