

Strengthening the skills of Canada’s future investment leaders through the CFA Societies Canada Ethics Challenge

2020 Challenge gathers students from across Canada to sharpen ethical decision-making skills

Toronto, Ontario March 03, 2020 – To be a CFA charterholder is to follow a world-class [Code of Ethics & Standards of Professional Conduct](#)—an essential element of building trust with Canadian investors. To that end, CFA Societies Canada has identified two-dozen up-and-coming financial professionals as finalists in the fourth annual [CFA Societies Canada Ethics Challenge](#), a training ground for encountering and thinking through the ethical challenges faced by investment professionals throughout their careers.

Finalists earned their spot through qualifying regional competitions that gathered university students from across the country. Students will be presented with a case study formulated around a potential ethical dilemma in which they must identify ethical issues and appropriate responses. Teams are judged on their ability to incorporate the CFA Institute Code of Ethics & Standards of Professional Conduct as well as their recommended course of action.

The competition is designed to promote critical thinking and ethical decision-making, while presenting students with real-life dilemmas of the types they may encounter throughout their careers. Mirroring real-life cases of ethical dilemmas promotes forward-thinking, deep reflection on the ethical principles that guide CFA charterholders.

“The success of our industry depends on trust between Canadians and investment professionals. That trust depends on the ethical strength of these investment professionals,” says Michael Thom, CFA, Managing Director of CFA Societies Canada.

“Our annual CFA Societies Canada Ethics Challenge is about building world-class ethical decision-making skills in the next generation of Canadian investment professionals, forging the trustworthy, standards-driven industry that Canadian investors deserve.”

Regional finalist teams to compete in the 2020 CFA Societies Canada Ethics Challenge hail from:

- Concordia University
- St. Francis Xavier University
- Thompson Rivers University



CFA Societies Canada

- University of Calgary
- University of Regina
- University of Waterloo

The finalist teams will head to Montréal, QC in May for a final case study competition. With only three hours between their initial briefing and final presentation, our finalists will present their findings to a live judging panel of CFA charterholders in the hopes of earning the national title. The winning team will be announced at a reception at Le Westin Montréal.

CFA Societies Canada

CFA Societies Canada is a collaboration of CFA Institute and the 12 Canadian member societies. It brings together these organizations to lead the investment industry in Canada by advocating for the highest professional standards, integrity, and ethics for the ultimate benefit of Canadians. For more information, visit www.cfacanada.org.

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