

North Texas/South Texas US Research Challenge

TIMELINE

September / October

Universities/liaisons introduce concept to university participants

Registration open for Student Teams to sign up at CFA Institute

Teams take advantage of resources on CFA Institute website

Distribute Official Rules to Faculty Advisor/teams

November - December

mid November - Target Company Announcement -

mid November - University teams of 3 - 5 selected

First week December - University teams receive their Template

First week December - Research Challenge KICK OFF

mid-December - Mentors assigned to teams

mid-December - Research Challenge KICK OFF: University teams, Advisors & Mentors must be registered on CFA Institute's website

January

Teams submit questions for management of target company to Co-ordinators for CFA Research Challenge

Early to Mid January - Company presents Students attend in person or via the internet.

Two weeks before written reports are due - Any team members substitutes must register on CFA Institute's Challenge site.

February

First week February - Teams submit written reports to CFA Research Challenge for evaluation by graders by 5pm.

Second week February - Finalist Teams announced Teams begin working on Oral Presentation

Saturday Late in February - Panel Final presentations/Finals Ceremony at TBD Venue / a Texas University

April/May

SubRegionals and Regionals (North and South America) in NYC

Global Finals will be held after the completion of the Americas, EMEA, and APAC