

## Useful advice, facts and information to use when approaching potential speakers

### INFORMATION FOR EMAILS

Introduce yourself as a member and volunteer of CFA UK. <https://www.cfauk.org/>

- CFA Society UK is the national member society of the CFA Institute. <https://www.cfainstitute.org/>. The CFA Institute has more than 165,000 members in 162 markets, of which more than 160,000 hold the Chartered Financial Analyst® (CFA) designation
- CFA Society UK supports 12000 members across the UK, with a mission to build a better investment profession - through the promotion of the highest standards of ethics, education and professional excellence
- CFA UK is one of the largest member societies of CFA Institute and provides continuing education, advocacy, information and career support on behalf of its members.

Introduce your working group.

Tell the speaker why you are contacting them (reference a paper, a presentation, or the fact they are specialised in a certain field).

Tell the speaker what you want from them.

### FACTS AND FIGURES

#### Audience

Unless the content is niche and/or community specific, it is worth mentioning that:

- It is composed of almost entirely of CFA UK members
- These members work predominantly in investment management and more generally in financial services.
- Additionally, there will be asset owners, wealth managers and consultants.

#### For virtual events

All virtual events are attended by CFA UK members for free and at a small cost to non CFA UK members. They are recorded and recordings uploaded into the CFA UK Professional Learning platform, Discover. This content is viewed only by CFA UK members.

*Wednesday Webinar at One: always on Wednesdays and always at 1pm GMT*

- Format: one or two speakers, usually backed up by slides, 25-30 minute presentation, 10-15 minute Q&A.
- Usual audience between 40 and 60.
- On the day log on at 12:45, log off around 1:45

*Evening webinar: Tuesdays, Wednesdays and Thursdays, from 5 to 6 pm*

- Format: single or multiple speakers, with or without slides, 35-40 minute presentation, 20-25 minute Q&A.
- Usual audience between 50 and 80.

- On the day log on at 16:45, log off around 18:00

**For pre-recorded interviews**

- Can be recorded at a time convenient to the speaker
- All recordings are done over Zoom and require the speaker to have a webcam and microphone.
- All editing for pre-recorded interviews is carried out by CFA UK staff
- All recordings are uploaded into the CFA UK Professional Learning platform, Discover. This content is viewed only by CFA UK members.