

FUNDING REQUEST FORM**PART 1 - NOTICE & CHECKLIST****IMPORTANT**

1. All Funding Request Packets must be submitted by 12 PM Friday, the week before the Funding Sub-Committee Meetings.
2. Funding Request Packets must be turned in no less than 5 business days (1 week) prior to the event.
3. Deadline for Request for Payment or Purchase Order (RPP) is 15 days after the event.

CSI EVENT REGISTRATION FORM

EVENT ESTIMATES / INVOICES (NOT PAID)

EVENT FLYER WITH ASI LOGO

REQUIRED SUPPORTING MATERIAL
BASED ON PURCHASES/EVENT**PART 2 - CONTACT & ORGANIZATION**

OFFICER NAME:

OFFICER TITLE:

ADDRESS:

CITY:

STATE:

ZIP:

PHONE:

EMAIL:

SIGNATURE:

CLUB/ORG:

EVENT TITLE:

DATE(S) OF EVENT:

SEMESTER:

EVENT LOCATION:

TOTAL ATTENDANCE:

EXPECTED CAL STATE LA STUDENTS ATTENDANCE:

PART 3 - EVENT DESCRIPTION

IS THE EVENT OPEN TO ALL CAL STATE LA STUDENTS?

YES

NO

BRIEFLY DESCRIBE THE EVENT:

HOW WILL THIS PROGRAM ENHANCE THE CAL STATE LA EXPERIENCE?

PART 4 - COST BREAKDOWN

HOSPITALITY	DESCRIPTION:	AMOUNT:	HONORARIA / CONTRACTS	DESCRIPTION:	AMOUNT:
MARKETING	DESCRIPTION:	AMOUNT:	OTHER	DESCRIPTION:	AMOUNT:

PART 5 - EVENT SUMMARY

TOTAL COST OF THE EVENT

TOTAL REQUESTED FROM ASI

AMOUNT FROM OTHER SOURCES

WHAT OTHER RESOURCES ARE YOU EMPLOYING FOR THIS EVENT:

OFFICE USE ONLY

STAFF INITIALS

TIME STAMP:



DIVISION OF STUDENT LIFE

Event Registration

2023 Finance Leaders' Conference

Submitted By: [REDACTED] 5:42:50 PM

Basic Information

Student organizations must complete and submit this form at least 10 business days prior to the event/meeting date. Reservations for on-campus events/meetings will not be confirmed unless this form has been completed.

Please select the type of organization who will be hosting this event.

Student Organization

Host Organization Name

What Organization/Department is hosting the event?
Financial Management Association

Event Name

2023 Finance Leaders' Conference

Estimated Attendance

Please describe the estimated attendance of participants for this event.
6

About the event

Please describe what this event is about and include all intended activities that will take place.

This Event will take place March 2nd to 3rd at Baruch College in New York City. The event is designed for undergraduate and graduate students interested in pursuing a career in finance. The conference will provide educational presentations about financial careers and news, networking opportunities with finance professionals and other FMA students, and engaging activities such as a tour of Wall Street and the Investment Analysis Competition. Attendees also have the opportunity of taking a free professional head shot to use on their LinkedIn profile. The event is a learning opportunity as well as an opportunity for us to represent ourselves and our school.

Time & Location

Submitting this form DOES NOT reserve the space. Please visit the resources at the bottom of this form to submit the appropriate reservation request.

Events/meetings that repeat or occur on non-consecutive dates will need to be registered separately

per each date, (e.g. if you plan on having a meeting on multiple days in the month). For more information on how to repeat registered events check out this [Presence guide](#)

Start Date/Time

03/01/2023 - 8:00 PM

End Date/Time

03/04/2023 - 11:00 AM

What format will this event/meeting use?

Hybrid events and meetings are defined as a mixture of in-person events/meetings with a virtual component usually running simultaneously and with overlapping content and interactive elements.

In-Person

Do participants need to RSVP?

Yes

How can participants RSVP for this event?

Online

RSVP Link

Requires <http://> or <https://>

<https://www.fma.org/FLC2023>

Where will your in-person event/meeting take place?

Off-Campus

Event/Meeting Virtual Link and/or In-Person Location

For virtual event/meetings, please enter the link where attendees can access the event/meeting.

For in-person on-campus events/meetings please add the room information where you'll be hosting.

For in-person off-campus events/meetings please add the full address of the venue.

For hybrid events/meetings please enter both the link and the in-person location.

Baruch College | 55 Lexington Ave, New York, NY 10010

Student Organization Officer and Advisor Contact Information

Only current organization officers can submit the Event Registration Form. Submitted forms will require Advisor approval prior to CSI approval.

Contact Person

Please provide the name of the officer submitting this form.

[REDACTED]

Officer Contact Phone Number

[REDACTED]

Contact Email

Provide the officer's email address.

[REDACTED]

Organization Advisor Email

Provide the advisor's Cal State LA email address.

[REDACTED]

Organization Advisor Name

Please provide the name of the student organization advisor.

[REDACTED]

Marketing

No publicity may be distributed or posted online until this form has been submitted and approved. All publicity material must comply with University Administrative Procedures AP P003 and AP P007. For Fall 2020 only electronic or virtual forms of marketing will be approved for student organizations.

How do you plan on marketing this event?

We do not plan on marketing this event to anyone outside of the organization.

Who is invited to this event?

Student organization members

Will off-campus media be notified about this event?

No

Tags

CONFERENCE

EDUCATIONAL

Cover Image

Please select an image that corresponds to your event.

REGISTER NOW!

2023 FINANCE LEADERS' CONFERENCE

2 - 3 March 2023 | Baruch College | New York, NY



ASI
ASSOCIATED STUDENTS, INC.

The Finance Leaders' Conference is the only international conference strictly for undergraduate and MBA level students held each spring. The conference addresses the needs and concerns of finance and finance-related students. Approximately 300 conference attendees will learn about what it takes to succeed in various financial careers, sharpen their leadership and communication skills, expand their professional contacts, learn from experts on how to start their career and achieve their goals, and visit local financial institutions and companies.



To learn more and to register, visit www.fma.org/FLC2023.

Event Details

Event Category

Please select any of the categories above that best describes your event. Note, for Fall 2022 organization meetings and tabling must also be registered.

Conference/Convention Hosting

Planned Activities

Will your event have any of the following activities? The University's General Release will be required for certain activities.

Domestic Travel

Will the event have security?

No

Will food be served at the event?

Food may be served at indoor and outdoor events, so long as the appropriate approval is received via the Temporary Food Permit.

No

Will the event have an admission charge, registration? fee, or raise any proceeds to benefit the organization

No

Will you be requesting funding from Associated Students, Incorporated?

For more information on Club and Organization Funding please visit: <https://asicalstatela.org/services/clubs-and-organizations-funding>
Yes

For more information on Club and Organization Funding please visit: <https://asicalstatela.org/services/clubs-and-organizations-funding>.
For any other questions contact the Vice President for Finance by calling 323-343-4778.

For this event, will your organization be seeking tax deductible private external fund raising support?

Are you seeking sponsorship from private individuals or external companies/organizations off campus that may require additional tax documentation? (Individual donations that do not require tax documentation do not count.)
No

Will a movie be shown at this event?

Student organizations must purchase the viewing rights or obtain permission from the owner of the movie in order to show movies at student organization events.
No

Student Organization Travel

Domestic Travel Guidelines

1. Student organizations must submit an Event Registration Form at least 10 business days prior to their travel dates. Organizations are encouraged to submit travel event registration forms in advance of the minimum 10 business day requirement.
 1. **Each Cal State LA student** who will participate in this student organization trip must review, complete, and sign the [Individual General Release Form and Emergency Contact Form](#) (both forms are located in one file)
 2. Your organization should complete the general waiver and emergency form process first **before** completing/submitting the Event Registration form.
 3. Student organization trip organizers must upload all signed copies of both forms for each participant planning on going on the trip **when submitting** the Event Registration form.

For more information on Student Organization Travel please refer to the [Student Organization Handbook](#).

Individual General Release + Emergency Contact Form*

Submit all Individual General Release + Emergency Contact forms for each Cal State LA student attending this trip. You may want to create a larger file with each form saved onto it. See the guidelines above for the direct link to the required form.
[b8ca25f5-7f7f-4ccc-a8a8-baab12f41812.zip](#)

Acknowledgment

Hybrid Event/Meeting Check-in Data Collection and Contact Tracing

Student organizations are **required to check-in** all Cal State LA student attendees at on-campus hybrid events/meetings held indoors via the Presence Checkpoint app at the event. This is mandatory for all student organizations hosting events/meetings in-person or with in-person components. For more information on how to use this feature and meet this requirement, students should refer to the [Presence Guide to Event](#)

[Check-in.](#)

Guests (anyone other than a Cal State LA Student) at indoor hybrid events/meetings **cannot check-in through the Presence Checkpoint app and are required to check-in** through the [Cal State LA Student organization Event Guest Check-in Form](#). Guests must successfully complete the [COVID19 Health Self-Screening](#) prior to entering an event.

Participant and/ or guests data collection for outdoor events is not required for attendees but is required for student event coordinators (including students who table for the organization and who will be present throughout the duration of the outdoor event/meeting) through the Presence Checkpoint app.

Attendance recordkeeping must be updated within 24 hours of the conclusion of the meeting or event.

Failure to check-in all event/meeting attendees can result in the student organization's revocation in their ability to host events and can ultimately affect their student organization recognition and the benefits associated with that status.

AS AN OFFICER OF THIS ORGANIZATION, I WILL TAKE RESPONSIBILITY TO ENSURE THAT THE EVENT WHICH MY ORGANIZATION IS SPONSORING WILL FOLLOW ALL GUIDELINES SET FORTH BY THE UNIVERSITY. I ACKNOWLEDGE THAT THIS EVENT AND ANY ASSOCIATED EVENT SPACE RESERVATIONS MAY BE SUBJECT TO CANCELLATION BASED ON MY ORGANIZATION'S RECOGNITION STATUS.

Signature Pad Field

A large, stylized handwritten signature in black ink, appearing to be 'MML'.

Scroll up to submit this form.

Event Guidelines & Resources

Student Organization Event Guidelines

2022- 2023 Event Registration Procedures

The following guidelines are provided for the benefit of the student organization. They are intended to be followed completely. Failure to comply with any of the following guidelines may result in disciplinary action taken against the organization including suspension of recognition, events and use of facilities. More information can be found online in the [Student Organization Handbook](#).

In compliance with [University](#) guidelines, Cal State LA student organization events and meetings for Fall and Spring Semesters 2022-2023 **can be held in virtual, in-person, or hybrid modes**. This applies to the following types of previously held events and activities including but not limited to:

- Meetings
- Tabling
- Social events
- Recruitment events
- New membership intake events and processes
- Information tabling or organizational promotions
- Community service or philanthropic events
- Organization meetings (both officer meetings and general body meetings)
- Workshops, trainings, and speaker events
- Conference, conventions, and retreats

Trip Expenses		
Details	Estimate Per Student	Estimate for Six Attendees
Flight Ticket Round Trip		
	\$ 800	\$ 4,800
Hotel Each room is about \$150 per night.	\$ 300	\$ 1,800
Meals	\$ 120	\$ 720
FMA Organization Fees \$35 membership fee \$175 RVSP For Conference	\$ 210	\$ 1,260
Transportation Uber needed from airport to hotel, hotel to conference, and vice versa.	\$ 100	\$ 600
Estimate Expense Total	\$ 1,530	\$ 9,180

FMA Orgnization Account Balance	\$ 3,747
Amount Needed	\$ 5,433

Notes:

FMA Organization Fees are the only Fixed Costs. Everything else is an estimate price, but estimates are rounded higher to avoid having a shortage in funds. We are in the process of requesting money from ASI. The maximum we can recieve is \$3,000. ASI Funding is not approved yet, they will approve or disapprove funding request on February 24th. Our Advisor Dr. Danso is working to recieve additional funding from the CBE Dean.

List of CSULA Student Attendees:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



CAL STATE LA

CALIFORNIA STATE UNIVERSITY, LOS ANGELES

COLLEGE OF BUSINESS AND ECONOMICS
OFFICE OF THE DEAN

TO: To Whom It May Concern
DATE: February 17, 2023
FROM: Ramon A. Castillo, Associate Dean
CC: A. Lim, C. Danso
SUBJECT: Letter of Support for the Financial Management Association

The College of Business and Economics fully supports the Financial Management Association traveling to the Finance Leaders' Conference in New York on March 2nd and March 3rd, 2023.

This conference will provide a valuable experience for our students. It will provide them an opportunity to network with industry leaders and compete in a renowned conference.

Sincerely,

Dr. Ramon A. Castillo
Interim Associate Dean
College of Business and Economics
California State University, Los Angeles



CAL STATE LA

CALIFORNIA STATE UNIVERSITY, LOS ANGELES

COLLEGE OF BUSINESS AND ECONOMICS
Department of Finance, Law, and Real Estate

February 9, 2023

Re: Letter of Approval and Support

To Whom It May Concern:

I am currently the faculty advisor for FMA. I write this letter in support of the Financial Management Association (FMA) traveling for the Finance Leaders' Conference to be held in New York on March 2 and March 3, 2023.

This is a very prestigious conference held in the financial capital of the world (i.e. New York). It will provide our student leaders with the opportunity to network with industry experts and leaders as well as learn and sharpen other skills. There is also the opportunity to participate in a competition and for the students to include their resume in a digital book for select employers and panelists.

I strongly believe given the proximity to Wall Street, which is the heart of finance, this is a great opportunity for our students and college.

Please find below a list of students who would like to go to this conference:

1
2
3
4
5
6

I approve of the request by the members of FMA to attend the conference. If you have any questions, please contact me at email: cdanso@calstatela.edu. Additionally, please find the link to the conference below: <https://www.fma.org/FLC2023> for your reference.

Sincerely,

Charles Danso, Ph.D.

Assistant Professor of Finance

Faculty advisor (FMA) & Coordinator of Financial Fitness Program

Department of Finance, Law & Real Estate

College of Business & Economics

California State University, Los Angeles

REGISTER NOW!

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