

FUNDING REQUEST FORM

PART 1 - NOTICE & CHECKLIST

IMPORTANT

- All Funding Request Packets must be submitted by 12 PM Friday, the week before the Funding Sub-Committee Meetings.
- Funding Request Packets must be turned in no less than 5 business days (1 week) prior to the event.
- 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: [REDACTED]
 OFFICER TITLE: [REDACTED]
 ADDRESS: [REDACTED]
 CITY: [REDACTED] STATE: [REDACTED] ZIP: [REDACTED]
 PHONE: [REDACTED] EMAIL: [REDACTED]
 SIGNATURE: _____

CLUB/ORG: Financial Management Association Club
 EVENT TITLE: 2024 Finance Leaders' Conference
 DATE(S) OF EVENT: Feb 29 - March 1 SEMESTER: SPRING
 EVENT LOCATION: 55 Lexington Ave, New York, NY 10010
 TOTAL ATTENDANCE: 8
 EXPECTED CAL STATE LA STUDENTS ATTENDANCE: 7

PART 3 - EVENT DESCRIPTION

IS THE EVENT OPEN TO ALL CAL STATE LA STUDENTS? YES NO
 BRIEFLY DESCRIBE THE EVENT:
 The event is an opportunity for student's interested in finance to learn about careers in finance, enhance their interpersonal skills and network with professionals.

HOW WILL THIS PROGRAM ENHANCE THE CAL STATE LA EXPERIENCE?
 The event is a chance for us to not only showcase our identity but also to represent our school. With the presence of other FMA students, it's important for us to ensure active participation from CSULA.

PART 4 - COST BREAKDOWN

HOSPITALITY		HONORARIA / CONTRACTS	
DESCRIPTION:	AMOUNT:	DESCRIPTION:	AMOUNT:
Hotel	\$2,559.84		
Airfare Quote	\$1,869		

MARKETING		OTHER	
DESCRIPTION:	AMOUNT:	DESCRIPTION:	AMOUNT:
		FMA Event Fees	\$1,470

PART 5 - EVENT SUMMARY

TOTAL COST OF THE EVENT \$5,898.84
 TOTAL REQUESTED FROM ASI \$3,000.00
 AMOUNT FROM OTHER SOURCES \$2,898.84

WHAT OTHER RESOURCES ARE YOU EMPLOYING FOR THIS EVENT:
 The College of Business is willing to cover the "Other" costs. They are also willing to cover anything remaining after ASI funding.

OFFICE USE ONLY

STAFF INITIALS _____

TIME STAMP: _____



[APPROVED]

Event Registration

2024 Finance Leaders' ConferenceSubmitted By: [REDACTED]**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

2024 Finance Leaders' Conference

Estimated Attendance

Please describe the estimated attendance of participants for this event.

8

About the event

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

Taking place from February 29 to March 1 at Baruch College in New York City, this conference is tailored for both undergraduate and graduate students keen on pursuing a career in business, with a specific focus on finance. The conference features educational presentations that explore a range of financial careers, recent news, and workshops, and provides networking opportunities with finance professionals and fellow students, including those affiliated with the FMA club at their respective schools. The agenda includes engaging activities like free professional headshots and the Investment Analysis Competition. This conference offers a valuable learning experience and serves as a platform for students to represent themselves and CSULA.

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

02/29/2024 - 8:00 AM

End Date/Time

03/01/2024 - 1:00 PM

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/flc2024>

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.

55 Lexington Ave, New York, NY 10010 (Baruch College)

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.

██████████

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. Your advisor must be listed in Presence on your roster as the advisor.

[REDACTED]

Marketing

No publicity may be distributed or posted online or in person until this form has been submitted and approved. All publicity material must comply with University Administrative Procedures AP P003 and AP P007.

How do you plan on marketing this event?

Email

Who is invited to this event?

Student organization members

Will off-campus media be notified about this event?

No

Would you like your graphic to be printed and displayed in the U-SU 2nd floor display cases?

No

Tags

Students can filter events by tags. You may choose multiple tags for a single event.

CAREER/PROFESSIONAL DEVELOPMENT

CONFERENCE

EDUCATIONAL

LEADERSHIP DEVELOPMENT

Cover Image

Please select an image that corresponds to your event. This will be the image visible on Presence. It CAN be your event flyer, but does not have to be.

REGISTER NOW!

Contact:
mlario16@calstatela.edu

FMA
FINANCIAL MANAGEMENT ASSOCIATION

ASI
ASSOCIATED STUDENTS, INC.

2024 FINANCE LEADERS' CONFERENCE

February 29 - March 1 | Baruch College | New York, NY

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.

NEW YORK STOCK EXCHANGE

WALL STREET BULL

Event Details

Event Category

Please select ALL of the categories above that best describes your event. Note organization meetings and tabling must also be registered.

Conference/Convention Hosting

Educational Workshop/Program

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 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 via email asivcf@calstatela.edu by calling 323-343-4778.

Will the event have an admission charge or registration fee? (Mark "ticket/audience participation fee under fundraiser)

No

Fundraising (Proceeds to Benefit)

Fundraiser (Proceeds to Benefit)

Type of Fundraising Activity

Please mark the most appropriate type of activity that corresponds with your event.

No Fundraising Activity

Will a movie/show 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. Additional information about this policy can be found here in the student org handbook.

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/submitted 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. Combine all forms into 1 file for uploading.

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. Create 1 document with all combined files. See the guidelines above for the direct link to the required form.

[82dce9eb-264d-43e2-91b2-baad6d6e6b67.pdf](https://asicalstatela.org/services/clubs-and-organizations-funding/82dce9eb-264d-43e2-91b2-baad6d6e6b67.pdf)

Alcohol

Does your organization plan on serving alcohol at this event?

No

Will the event be held in a restaurant/venue where alcohol is sold/served but will not be a part of your event?

No

Acknowledgment

As an officer of this organization, I will take responsibility to ensure that the event that 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.

I understand that submitting this form does not guarantee my event will be approved. I must reserve space with the appropriate venue, submitting this form does not reserve the space.

Signature Pad Field

A handwritten signature in black ink, appearing to be 'Paul', written on a signature pad.

Scroll up to submit this form.

Event Guidelines & Resources

Student Organization Event Guidelines

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 **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

2024 Finance Leaders' Conference – Expenses

Event Participants

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.




Hotel	\$2,559.84
FMA Event Fees	\$1,470
Airfare Quote Estimate	\$1,869
TRIP TOTAL:	\$5,898.84


Hotel


\$639.96 per room * 4 rooms = **\$2,559.84**

The *same* invoice has been received for each room separately. This has not been paid; the rooms are reserved, and the price is fixed but it will be paid upon arrival.

Two students of the same gender will be accommodated for each room and one student will not share. Trying to change the double bed room to a single bed right now, makes the total more expensive. The breakdowns for the cost per night are below.

[45 East 33rd Street](#)
[New York NY 10016 US](#)  +12127551108
[Maps & Directions>>](#)

28 WED FEB |  3 Nights | **2** SAT MAR
Check In: 3:00 PM | Check Out: 12:00 PM

 [Add to Calendar](#)

Your Room Information

Guest Name: [REDACTED]
Guests: 2 Adults
Rooms: 1
Room Plan: 2 DOUBLE BEDS

Your Rate Information HONORS SEMI-FLEX

Rate per night
28-Feb-2024 - 29-Feb-2024 150.76 USD
29-Feb-2024 - 01-Mar-2024 148.03 USD
01-Mar-2024 - 02-Mar-2024 249.70 USD

Total for Stay per Room
Rate **548.50 USD**

Taxes 91.46 USD

Total price for Stay **639.96 USD**

Airfare Quote

\$267 * 7 = \$1,869

Airfare will be bought after the ASI Finance Meeting on Feb 1. It is expected the cost will be slightly higher as we approach closer to the event.

Basic Economy

Round trip (non-refundable)

\$267 per person

Total \$266.20 (all passengers)

Includes taxes and carrier-imposed fees
[Price and tax information](#)

Most restrictions

- ✗ No changes allowed¹
- ✗ Pay to choose any seat on American flights (or we'll assign seats at no charge during check-in)²
- ✗ Pay to check bags³
- ✗ Board in last group³
- ✓ AAdvantage[®] miles

¹ Changes for trips that begin in Europe allowed with a fee (excludes Finland, Estonia, Latvia and Lithuania).

² Complimentary for AAdvantage[®] members based on status.

³ If you're an AAdvantage[®] status member or AAdvantage[®] credit cardholder, your bag benefit and boarding group applies if higher based on status. (Benefits may not apply on partner airlines.)

[Bag and optional fees](#)

DEPART

Los Angeles, CA to New York, NY
Wednesday, February 28, 2024

9:50 AM → 7:46 PM 6h 56m 1 stop Basic Economy

LAX - ORD = AA2608 = 738-Boeing 737

✈️ 📶 📺 📺 📺

ORD - LGA = AA562 = 738-Boeing 737

✈️ 📶 📺 📺 📺

[Details](#) | [Change](#)

RETURN

New York, NY to Los Angeles, CA
Saturday, March 2, 2024

1:29 PM → 7:03 PM 8h 34m 1 stop Basic Economy

LGA - PHL = AA4724 = E75-Embraer 175

✈️ 📶 📺 📺 📺

Operated by Republic Airways as American Eagle

PHL - LAX = AA811 = 32Q-Airbus A321neo

✈️ 📶 📺 📺 📺

[Details](#) | [Change](#)

FMA Event Fees

\$210 * 7 = \$1,470

Financial Management Association International
University of South Florida
Muma College of Business Administration
Tampa FL 33620-5500
Tel: 833.946.4512
Fax: 813.974.3318
bsn-fma@usf.edu

INVOICE 93467



California State University, Los Angeles

United States

Invoice # 93467
Invoice Date 01/13/2024
Invoice Due 02/12/2024

Amount Due	\$ 0.00
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Transactions

Description	Amount
Membership Join - Student (through Jan 12, 2025) - 1 period - \$35.00	\$ 35.00
2024 FLC Registration - Conference Registration - \$175.00	\$ 175.00

Payments

Description	Amount
Credit Card Payment on 01/13/2024	-\$ 210.00

Total Amount	\$ 210.00
Amount Paid	-\$ 210.00
Amount Due	\$ 0.00

Wire Transfers

To pay this invoice by wire transfer rather than by check or credit card, please contact FMA at bsn-fma@usf.edu or at 833-946-4512.

Membership fees are non-refundable.



CAL STATE LA

CALIFORNIA STATE UNIVERSITY, LOS ANGELES

COLLEGE OF BUSINESS AND ECONOMICS
OFFICE OF THE DEAN

TO: To Whom It May Concern
DATE: January 16, 2024
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 from February 29th to March 1st ,2024.

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

Sincerely,

Ramon A. Castillo (Jan 17, 2024 12:56 PST)

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



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

January 17, 2024

Re: Letter of Support for the Financial Management Association's travel

From: Jong Yi, Chair, Department of Finance, Law, and Real Estate

To Whom It May Concern:

This letter is to enthusiastically support the proposed travel for members of the Financial Management Association (FMA) to the Finance Leaders' Conference in New York on February 29 to March 1, 2024.

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,

Jong Yi, PhD
Chair, Department of Finance, Law, and Real Estate
College of Business and Economics
California State University, Los Angeles
5151 State University Drive
Los Angeles, CA 90032
Email: jyi@calstatela.edu

2024

FINANCE LEADERS' CONFERENCE

29 FEBRUARY & 1 MARCH | NEW YORK, NY

The FMA 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 200 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.



REGISTER TODAY!



Contact: mlario16@calstatela.edu

For more information and to register, visit www.fma.org/FLC2024.

