Curtin Finance Society

CFS Committee Meeting 3, S2 2026

Update for the week (upcoming events, projects, feedback, etc)

When	26-08-2026
Location:	Online, Online
Chairperson	Naman Mehta
Minute taker	Naman Mehta

Minutes

1. Marketing

Marketing Avenues used for the Equity Research Event:

- Posters have been put up
- Initial Reel and Post to introduce the event has been posted
- Email has been sent out to our members
  - In 6 days we have sold 21 tickets.
- More posts and content is on the way

CFS B-day event:

- Tickets have been sold out.
- We have made this a free event to give back to the team and to our members. With free tickets, some people may buy one but then not show up. So for next event like this, we will sell tickets but at a lower price such as $3 for members and $5 for non-members.
- We used up all 400 club points for the Tav which gets us free food and the AV system(projector, microphone, speaker, etc).

2. Events

CFS B-day event:

- All aspects have been taken care of
  - Just need to make the goodie bags(we have a lot of excess inventory including 80 of the previous CFA designed tote bags) so this event will be a great opportunity to give these away.
  - Prizes have been organised
  - Cake was also taken care of by Trisha.
  - Edwin made the quiz and bingo and is the quiz master for the night.

Equity Research Event:

- Event agenda has been moved back by 30mins as Regan will be able to get on campus by 6:00 instead of 5:30.

New events team:

- Currently working out a time where everyone can meet to do a proper onboarding session. Will take everything we have learned and all questions and concerns that have come up in previous onboardings to this meeting to ensure process is a lot smoother and the new team gets a better understanding of the role.
- Have chosen 3 new members to join us.

FAAA/Capital Partners Event:

- Room has been booked (500.1102AB).
- Final details are coming soon and marketing will start shortly.

EY:

- Has their EOFY tasks to work on and they are pretty much done with their internship intake, so the event won't go through but they did say that they would do it next year.
- They will send specialised content instead for this sem.

3. Sponsorship

General Update:

- Sponsors have sent out more content
  - CFA has sent:
    - A post about their applications for the CFA Program Access Scholarship: https://www.cfainstitute.org/programs/cfa-program/scholarships/access
    - The CFA Institute x AmplifyME Investing Simulator Challenge session: https://global.cfainstituteevents.org/event/39a36606-760e-4dd5-8a55-2c48a43f482c/summary?tm=f7HEBeNOH3nUvtRJhXG5ReAD7Qri7IpUAv3MB6mm6uM
    - An article about A successful career in finance is built on more than technical expertise alone:

        https://www.cfainstitute.org/insights/articles/career-capital-in-finance
    - Capital Partners + FAAA have sent:
        - A link to their upcoming webinar about Different Career Pathways in Financial Advice: https://faaa.au/event/webinar-more-than-one-path-real-stories-and-career-pathways-in-financial-advice/
    - EY sent:
        - An application link for their Vacationer and Graduate programs for Tax and Audit: https://www.ey.com/en_au/careers/student-entry-level-programs
        - A link to join their talent community: https://eyglobal.yello.co/app/collect/form/iTmmUGgVq7gUlf2GLjazDg

- Newsletter idea:
    - Our sponsors are also part of the team and they help us in many ways. The team is working on a newsletter to showcase our work on a monthly basis. It will include everything; our marketing, SMIF, Events, etc.
        - The 2 goals for this are:
            - Sponsorship retention - if we keep showing them how great the team is doing and what we are working on for all of our sponsors, they would be more inclined to sponsor us for the next year.
            - Keeping them in the loop - if we show them how our events look, what results our marketing gets us and how the SMIF is tracking, they would have more ideas for events, know how to maximise our collaboration. An idea is a highlights page where we showcase team members who have done great work in the month and that should help them get to know you and potentially help you get an internship.

- Sponsorship workshop
    - Amy had gone to the sponsorship workshop to learn about how to make a good prospectus and how to approach sponsors. Here are the key takeaways from it:
        - The workshop was insightful and they helped the students learn new things that they hadn't encountered before.
        - Taught the students how to condense and be straightforward whilst also being gentle.
        - Tips were given such as making sure the executive summary is down packed as that is what a company reads first and its basically the elevator pitch.

4. SMIF

We have just received approval for a licence to LSEG/Revinitiv program. Will make an account for this soon.

- We can look into investing now.
- The team will be completing another research run and also looking at a competition for this sem. Investing will most likely start next sem.

Our first marketing post is out for the SMIF to promote it and showcase how it is going.

- The reception has been great. We have already seen multiple people reach out to learn more and/or to potentially join the team as well.
- So it can only go up from here. If we are consistent with the marketing, the SMIF team will have a big impact.
- This can also help especially since we are considering doing investing workshops to talk about investing, research, etc. Tickets should sell out for these easily.

5. General

Aiming bigger:

- Due to so many things snowballing at once, the team didn't get a lot of time to promote the bday event and the Equity Research workshop. But looking at the analytics, we have sold a high number of tickets in a 1 week span. Now that the backlog for the team overall is about to be fully cleared, marketing will have more time to promote events and the events team will be able to submit applications and get event details early. And we have had really good feedback from our events and students are constantly joining our club after the O-days (current amount of members is 230).
    - What this means: we can and should aim bigger with our events. We have been setting numbers for tickets at 30 - 40 per event. I think we should start doing 60 tickets for our events. We have a bigger events team, marketing is gaining lots of traction, and with the help of every person in the team we have built up a strong reputation and thus this is very possible for us to do.

Event applications:

- We need to provide more detail in them to fully let the organisers know what exactly we are planning and thus on their end they can assist better.

Team feedback:

- An area that needs work is our onboarding process - getting new recruits to fully understand CFS (our structure, where to store files and documents, how to progress, etc). I have taken the feedback received and will be working with the directors to improve this.

MYOB workshop:

- Taryn, Abrar and I went to this workshop on the 19th to learn about how to better our usage of MYOB and thus how to better submit our end of year numbers at the AGM period.
- We learned
    - About the MYOB app which allows us to take a picture of a receipt to automatically upload to our system.
    - How to better record purchases
    - We ran through scenarios of which type of purchases are ok to make and which type of purchases aren't ok along with the reporting standards of the scenarios.
    - The Guild team went through the ways they can also help us with MYOB and our money.
    - They also told us about how we can get free marketing posters printed through them. I will run this with the marketing team to see if we can save costs here.

End of minutes.