

CAIA Exam Grader Volunteer Agreement

The undersigned volunteer (“Volunteer”) certifies that he or she currently is a member in good standing of the Chartered Alternative Investment Analyst Association, Inc. (“CAIA”), and desires to participate on a volunteer basis in CAIA’s examination grading committee (the “Committee”). The undersigned understands that participation in the Committee will involve an in-person meeting to grade responses to questions on the CAIA Level II Exam. The undersigned has sought this volunteer opportunity to enhance his or her professional experience. CAIA has agreed to provide the Volunteer with the volunteer opportunity he or she seeks; and the Volunteer is willing and able to provide such volunteer services for CAIA in accordance with the provisions hereinafter set forth.

In consideration of CAIA offering me the opportunity to participate in the Committee and other good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the undersigned has entered into this Job Task Analysis Volunteer Agreement (this “Agreement”), and acknowledges and agrees as follows:

1. I acknowledge that my service on the Committee will be on a volunteer basis without pay in accordance with the provisions of this Agreement. I acknowledge that my services are entirely voluntary, with no coercion by CAIA, no promise of advancement, and no penalty for not volunteering. I have received a copy of CAIA’s Member Policy Manual (the “Manual”) and am thoroughly familiar with its contents, including without limitation, CAIA’s volunteer policy described therein. I agree to adhere at all times with the provisions of the Manual and have no expectation of payment or any other remuneration for my participation on the Committee.

2. I wish to participate as a volunteer grader (“Grader”) of examinations administered by CAIA (“CAIA Exams”). I understand that, if I am selected as a Grader, CAIA will provide me with access to various materials relating to its CAIA Exams, including but not limited to: curated curriculum readings, exam questions; candidate responses to questions; and policy, training and support materials (collectively, the “Exam Materials”). Although the actual grading of CAIA Exams will take place at an in-person event on [April 16-18, 2020 at Smith College Conference Center in Northampton, MA](#) (the “Grading Event”), I understand that I may be provided with access to Exam Materials prior to the Grading Event.

3. I understand that, in keeping with its obligation to its members and candidates, CAIA takes extraordinary efforts to preserve the integrity of the CAIA Exams. Accordingly, I will keep and maintain all Exam Materials in strict confidence, and shall not discuss, disclose or otherwise provide any such Exam Materials, in whole or in part, to any person, company, or other organization, with the exception of CAIA and its current employees. Without limitation, I agree not to discuss any CAIA Exams, or any Exam Materials with any person other than CAIA employees. I will not make copies of Exam Materials or portions thereof by any means for any reason. I agree not to use Exam Materials for any purpose other than pursuing the proper objectives of grading CAIA Exams at the official CAIA Grading Event. I agree to promptly return to CAIA, or shred or otherwise destroy all Exam Materials then in my possession, custody or control immediately upon the conclusion of the Grading Event or, if sooner, at CAIA’s request. I understand that, except as otherwise specifically indicated, my obligations under this Agreement shall survive indefinitely.

4. As consideration for CAIA granting me access to the Exam Materials and in order to preserve the integrity of the CAIA Exam process, I agree that I will not, whether as an owner, officer, director, employee, volunteer, or independent contractor, provide any services or information related to the Exam Materials or a CAIA Exam to any company, person or organization that engages in the business of

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preparing people to take a CAIA Exam or to any person taking, preparing to take or intending to take a CAIA Exam, from the date hereof through the second (2nd) anniversary of the last date on which I had access to any Exam Materials, regardless of whether or not I actually accessed such Exam Materials during said period. Without limitation, I understand that this means that I may not instruct or teach any course or program designed to prepare others to take a CAIA Exam, or assist anyone else in doing so, at any time during the restricted period referenced above.

5. I acknowledge that CAIA would not have disclosed the Exam Materials to me or allowed me to serve as a CAIA Grader if I had not executed this Agreement, and that no provision herein will affect my ability to support myself. I also recognize the irreparable injury which might result to CAIA if a breach of this Agreement should occur and agree that in addition to any other legal remedies that CAIA may have, CAIA shall be entitled to injunctive relief and such other equitable remedies as a court of competent jurisdiction may deem appropriate, without any obligation to post any bond. I also agree to indemnify, defend and hold CAIA harmless from any and all liabilities, claims, suits, costs and expenses (including legal fees) arising as a result of any breach by me of this Agreement.

6. I agree that this Agreement shall be governed by the laws of the Commonwealth of Massachusetts and submit to the exclusive jurisdiction of the United States District Court located in Springfield, Massachusetts and/or the Massachusetts Superior Court and District Court located in Springfield, Massachusetts in any action or proceeding.

This Agreement is executed as an instrument under seal as of this date:

Name: _____

(Signature)

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The CAIA Grading Jamboree will be taking place April 16-18, 2020. You will be expected to arrive on the evening of Thursday April 16 and the work sessions end no later than 6 pm on Saturday April 18. The dinners after each day of grading are optional. After completing this information, you will be directed to the event information page with all the event details. Please bookmark this page and **complete your registration** to ensure your place on our grading team this April.

Email Address: _____

Mobile phone number: _____

Date of Birth (needed for travel agent): _____

Company: _____

City: _____ State/Province: _____

Country: _____

Credentials: _____

I understand that I am required to attend the Orientation dinner Thursday evening, 6:00 – 8:30 pm.
(Smith College Conference Center)

I plan to attend the Saturday evening closing banquet at the Deerfield Inn, 7:00 – 10:00 pm.
(Transportation is provided.)