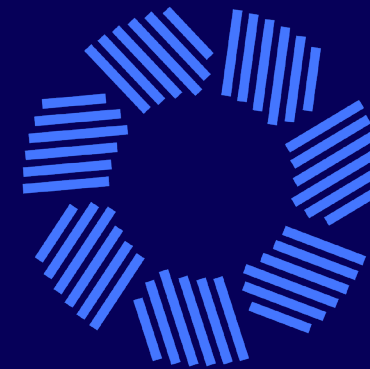
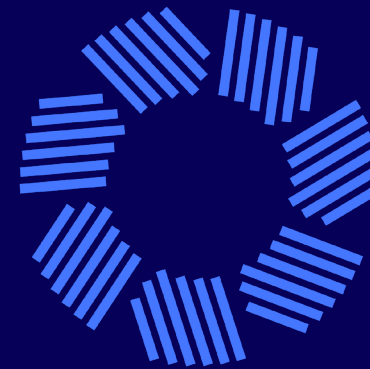
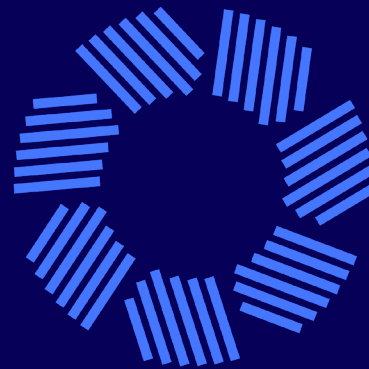
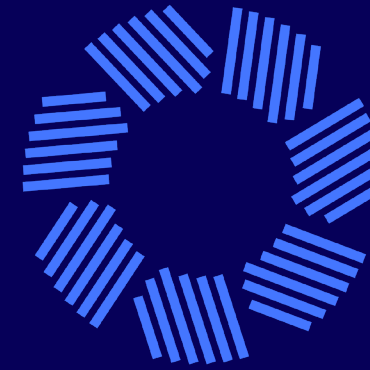
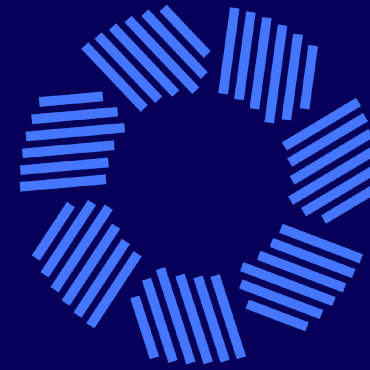
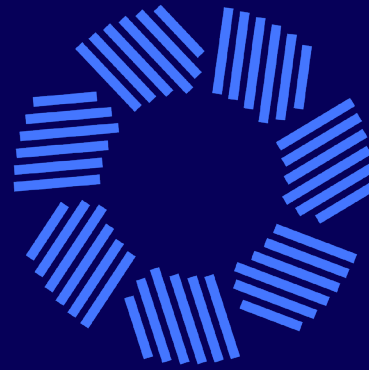
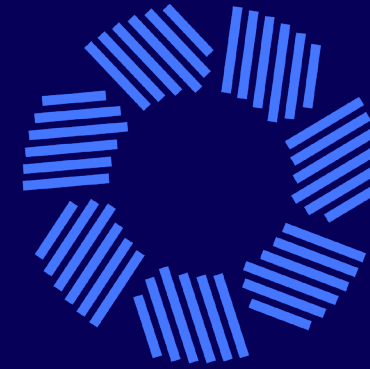
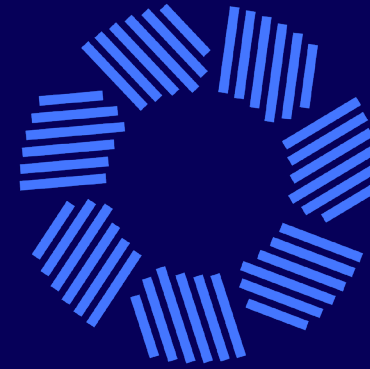
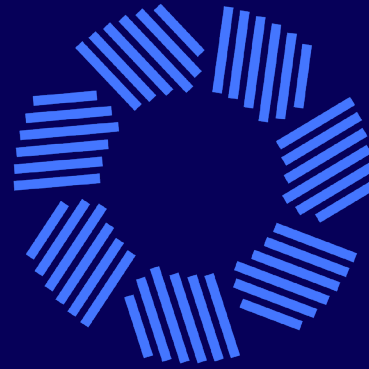


From Candidate to Charterholder | Earn your CFA Charter

TIPS prior to application

- ✓ Ensure you can log into your CFA Account
- ✓ Possess 3-5 years of relevant work experience
- ✓ Network with multiple CFA charterholders



Membership Application Requirements

Become a member to use your CFA® and CIPM® designations, engage with the issues affecting the profession, connect with local and global colleagues, and access top-tier professional learning resources and the latest industry insights.

1) Pass CFA Exams

[CFA Program](#) is a three-part exam. Passing the exam for all three levels, along with the applicable [practical skills modules](#), is a requirement to obtain the CFA charter.

2) Work Experience

Complete work experience requirements before, during, or after participation in CFA Program. Your experience must be directly involved with the investment decision-making process or producing a work product that informs or adds value to that process.

[Application Resources](#)

3) Professional References

In support of your membership application, you will need to provide 2-3 professional references. References will be asked to comment on your work experience and professional character.

[Application Resources](#)

4) Submit Application

Apply to become a regular member of CFA Institute. Once your application is approved and you have joined CFA Institute, you will have earned the CFA charter.

[CFA Account \(login required\)](#)

Qualifying Work Experience

Work experience requirements will be applied to Regular membership applications, have a combination of **4,000 hours of work experience, completed in a minimum of 36 months**. Complete work experience requirements before, during, or after participation in CFA Program. Qualified hours must be [directly related to the investment decision-making process](#) or producing a work product that informs or adds value to that process.

There are **three types** of acceptable work experience for Charterholder/Regular Membership with CFA Institute and award of the CFA charter:

- Evaluating or applying financial, economic and/or statistical data as part of an investment decision-making process that involves securities of similar investments.
- Supervising persons who conduct such activities.
- Teach such activities.

To determine whether your work experience may qualify you for Regular Membership, please utilize our [work experience self-assessment tool](#) to evaluate your professional background effectively.

Take the Work Experience Self-Assessment

Applicants can take our Work Experience Self-Assessment ([click here](#)) to better understand if your prior job responsibilities meet the requirements for earning the CFA® designation.

- | | | |
|---|---------------------------|--------------------------|
| 1. Do you construct or rebalance client portfolios, prepare financial models, or perform/evaluate independent analysis leading to an investment decision? | Yes <input type="radio"/> | No <input type="radio"/> |
| 2. Do you make investment decisions based on the application of financial, economic, or statistical data involving securities or similar investments held as part of an investment portfolio? | Yes <input type="radio"/> | No <input type="radio"/> |
| 3. Do you determine capital structure and funding needs through equity, debt, and alternative investments, conduct long-range financial planning, evaluate financial fundamentals, analyze and value securities for public offerings or mergers and acquisitions, and/or make asset sales and capital investment decisions? | Yes <input type="radio"/> | No <input type="radio"/> |
| 4. Do you conduct asset allocation analysis or apply investment knowledge to develop, analyze, and/or explain investment policy statements or strategies designed to achieve investor goals as part of the overall investment process? | Yes <input type="radio"/> | No <input type="radio"/> |
| 5. Are you engaged in investment/financial advising or planning for corporations, institutions, or individuals (other than yourself or your family)? | Yes <input type="radio"/> | No <input type="radio"/> |

SELF-ASSESSMENT RESULT

YOUR WORK EXPERIENCE IS LIKELY TO QUALIFY.

Based on your responses, your work experience is likely to meet our requirements for regular membership.

We invite you to find out more about how you can become a member of CFA Institute.

- | | | |
|--|---------------------------|--------------------------|
| 6. Do you supervise employees who evaluate or apply financial, economic, and/or statistical data as part of the investment decision-making process? | Yes <input type="radio"/> | No <input type="radio"/> |
| 7. Do you research or develop tools, models, strategies, and/or communications that assist portfolio managers and traders with investment decision and risk management? | Yes <input type="radio"/> | No <input type="radio"/> |
| 8. Do you oversee legal/regulatory compliance matters in the investment profession, perform due diligence, and/or ensure that investment firms adhere to applicable laws, regulations, and professional standards of practice? | Yes <input type="radio"/> | No <input type="radio"/> |
| 9. Are you a full-time professor or instructor teaching finance-related courses and/or CFA Program curriculum, developing educational content, and engaging in research to advance the understanding of investment practice and theory? | Yes <input type="radio"/> | No <input type="radio"/> |
| 10. Do you design and implement software solutions for people, processes, and technology that directly drive investment decisions (i.e., software and/or platforms that are used to build financial models, construct, manage, and analyze portfolios, analyze risk and return)? | Yes <input type="radio"/> | No <input type="radio"/> |

SELF-ASSESSMENT RESULT

YOUR WORK EXPERIENCE IS NOT LIKELY TO QUALIFY.

Based on your responses, your work experience is not likely to meet our requirements for regular membership.

Select Professional References

When you apply for membership, you will be asked to provide professional references in support of your application.

How Many References Should You Provide?

2 References, if one is an active regular member of the local society to which you are applying, OR
3 References, if none of them is an active regular member of the local society you are applying.

Who Should Be a Reference?

While we prefer references from your supervisor(s), you may select other individuals who can describe and attest to your responsibilities in the investment decision-making process (as defined in our work experience guidelines).

References will be asked to comment on your work experience and professional character. You will send instructions to your references as part of your application; more information is provided during the application process.

You cannot serve as a reference for your own application.

The Process | CFA Account

From the “**My Account**” dashboard, please click on the Membership tile. Please login to your existing CFA account for application. If you forgot your password, please submit your request to info@cfainstitute.org for assistance. **DO NOT** create a new CFA account to earn the CFA charter!

The screenshot shows the 'My Account' dashboard of the CFA Institute. The navigation bar includes 'Business', 'Universities', and 'University students'. The main navigation menu has 'CFA Institute', 'Programs', 'Membership', 'Insights', 'Standards', and 'About'. The dashboard is titled 'My Account' with the subtitle 'Manage your profile, update your preferences, and access learning products.' Below this, there are three sections: 'Programs' with 'CFA Program' and 'CIPM Program' tiles; 'Certificates and Courses' with 'Certificates & Courses' and 'Sustainable Investing Certificate' tiles; and 'Membership Activities' with 'Membership', 'Volunteer Opportunities', and 'PL Tracker' tiles. The 'Membership Activities' section title is circled in red.

The Process | Charterholder Membership

To select “Apply for Charterholder / Regular Membership”.

CFA Institute

Account | Log Out

Membership Applications

Manage Applications

Manage Applications

Demonstrate your commitment to the investment management profession

Join a global community of investment management professionals dedicated to high ethical and educational standards.


[Apply for Charterholder/Regular Membership](#)

[Apply for Affiliate Membership](#)

[Learn More about Membership Requirements >](#)

The Process | Personal Information

To review and edit your personal information if necessary.

Account | Log Out

Charterholder and Regular Membership Application

Please review the information below and make any necessary edits

* indicates a required field

Personal Information [Edit](#)

Name Giovanni Stroman II	Phone CAN +1 8293657970
Mailing Address vZhCWLM JhHcKFI yBBbYdF Waterloo, Ontario N2L 5W6 Canada	Secondary Email Address None provided CFA Institute ID 204820373

Personal Information Confirmation *
 I confirm that the above information is correct.

Step 1 of 6

Personal Information

Select Society

Education

Work Experience

References

Review and Submit

Save and Continue

The Process | Select a Society

When applying for a membership with CFA Institute, applicants will also apply for membership in a CFA society.

The screenshot shows the CFA Institute website interface for a membership application. At the top left is the CFA Institute logo and name. At the top right is a user profile icon with links for 'Account' and 'Log Out'. The main heading is 'Charterholder and Regular Membership Application'. Below this is a sub-heading 'Select Society' with a note that an asterisk indicates a required field. The text explains that as a member, you join a global community and that adding a society membership expands your support of ethical and educational leadership. Two dropdown menus are highlighted with a red box: 'Select Your Society' with 'Asia Pacific' selected, and 'Select Society' with 'CFA Society Singapore' selected. A vertical sidebar on the right shows the progress of the application: 'Step 2 of 6', 'Personal Information' (checked), 'Select Society' (current step), 'Education', 'Work Experience', 'References', and 'Review and Submit'. A blue 'Save and Continue' button is at the bottom left.

CFA Institute

Account | Log Out

Charterholder and Regular Membership Application

* indicates a required field

Select Society

As a CFA Institute Charterholder or Regular member, you will be part of a global community with shared values of integrity and competency in investment practice. Active participation in CFA Institute and a CFA Society contributes to shaping the investment profession for the better.

By adding a society membership, you expand your support of the vital functions of ethical and educational leadership in your local community.

Select Your Society *
Select Region: Asia Pacific

Select Society: CFA Society Singapore

Step 2 of 6

- Personal Information
- Select Society
- Education
- Work Experience
- References
- Review and Submit

Save and Continue

The Process | Education

To review and edit your education information if necessary.

CFA Institute Account | Log Out

Charterholder and Regular Membership Application

✔ Your Education Information has been updated. ✕

Education

1 Bachelors or equivalent [Edit](#) | [Delete](#)

University of Cassandra
Finance
May 2020

[+ Add Education](#)

[Save and Continue](#)

Step 3 of 6

- ✔ Personal Information
- ✔ Select Society
- Education**
- Work Experience
- References
- Review and Submit

The Process | Work Experience

Your work experience hours are determined by the percentage of time spent each week on investment decision-making activities. This is calculated based on the total months worked in each role, with at least 50% of your time required to be directly involved in the investment decision-making process.

The screenshot shows the 'Charterholder and Regular Membership Application' form, Step 4 of 6: Work Experience. The form is divided into two main sections: 'Edit Position' and 'Work Experience'.

Edit Position:

- Employer / Firm Name ***: FinaWealth Investments
- Job Title ***: Analyst
- Job Category ***: Analysis - Derivatives
- Do you currently work here? ***: Yes (selected)
- Start Date ***: 06/2020 (highlighted with a red circle)

Work Experience:

- What is the average number of hours per week for which you are paid or credited for working? ***: 40
- What percentage of those hours do you spend performing activities such as evaluating or applying financial, economic, and/or statistical data as part of the investment decision-making process; supervising persons who conduct such activities; or teaching such activities? ***: 75
- Job Description ***: Analysis of derivatives

The form includes a navigation menu on the right with options: Personal Information, Select Society, Education, Work Experience (selected), References, and Review and Submit. There are 'Update' and 'Cancel' buttons at the bottom right.

An Example | Qualifying Description

Job Title

Senior Consultant

Job Category

Financial Advising

Why It's Good

1. The applicant describes the types of independent analysis involved in this position.
2. The applicant creates financial models and investment recommendations as work products that influence investment decisions.

Employment Duration

May 2018 - February 2021

(34 Months)

(5893 Hours)

Job Description

1) Joined multiple banks' Treasury Platform Digitalization projects and Asset and Liability Management (including retail banking) projects • As the onsite leader, offered hedge management advisory for the asset and liability management of a joint-equity commercial bank, the service including analysing the bank's whole business, including retail banking, and then recognizing potential hedged items, designing the hedge management blueprint and establishing the hedge management digital system for the bank • As the front-office leader, offered Treasury Platform Digitalization service for a joint-equity commercial bank and two leading city commercial banks, including designing digital transformation requirements by analysing clients' business structure, products' characteristics and workflows, and then helping clients choose the right system and making the system go live 2) Proficiently used different valuation models and software, like Bloomberg and FinCAD, to value a variety of financial products

An Example | Non-Qualifying Description

I conducted an annual actuarial valuation process and benefit calculations.

What It's Missing

Although the applicant describes the types of independent analysis involved in this position, this description needs to better demonstrate how the analysis created a work product that added value to the investment decision-making process.

Improved Description

I conducted an annual actuarial valuation process and benefit calculations which included performing projections, cash flow analysis, and durational analysis of individual health insurance policies. These analyses had a direct bearing on the investments chosen to back the reserves for these blocks of business.

The Process | Work Experience Summary

Applicants can provide details for multiple jobs by clicking the “**Add Position**” button again.

CFA Institute Account | Log Out

Charterholder and Regular Membership Application

Your Work Experience has been updated. ×

Step 4 of 6

- ✓ Personal Information
- ✓ Select Society
- ✓ Education
- Work Experience**
- References
- Review and Submit

Work Experience

i Starting with your most recent employment, enter all positions where part of your work included evaluating/applying financial, economic, and/or statistical data as part of the investment decision-making process; supervising persons who conduct such activities; or teaching such activities.
Only hours spent performing qualifying activities count towards the required 4,000 hours of work experience over a minimum period of 36 months.

1 **Employer Name** [Edit](#) | [Delete](#)

FinaWealth Investments

Job Title
Analyst

Job Category
Analysis - Derivatives

Duration
June 2020 - November 2024 (54 Months)
(7020 Hours)

Job Description [View Job Description](#) ▾

Add this work experience to my application.

Total work experience: **54 Months**
7020 Hours

[+ Add Position](#)

The Process | Professional References

Remember to “tick” the box if your selected professional reference is an active regular member of the local society to which you are applying.

CFA Institute Account | Log Out

Charterholder and Regular Membership Application

* indicates a required field.

Add Reference

To complete your application, you must provide contact information for three professional references. However, if one of your references is an active Charterholder or Regular member of the CFA Society to which you are applying, you are only required to submit two references.

Given Name(s) *
First name and any middle name(s)
Orange

Surname *
Last Name
Pepper

Email Address *
orange.pepper@mailinator.com

Relationship to Applicant *
Current or former colleague

This reference is an active Charterholder or Regular member of the CFA Society to which I am applying.

Update Cancel

Step 5 of 6

- Personal Information
- Select Society
- Education
- Work Experience

References

Review and Submit

Charterholder and Regular Membership Application

References

To complete your application, you must provide contact information for three professional references. However, if one of your references is an active Charterholder or Regular member of the CFA Society to which you are applying, you are only required to submit two references.

- Reference Name**
Green Pepper
Email Address
green.osoper@mailinator.com
Relationship to Applicant
Other professional reference
Active Charterholder or Regular member of selected society.
- Reference Name**
Red Pepper
Email Address
red.osoper@mailinator.com
Relationship to Applicant
Current or former colleague
- Reference Name**
Yellow Pepper
Email Address
yellow.osoper@mailinator.com
Relationship to Applicant
Current or former supervisor

Step 5 of 6


- Personal Information
- Select Society
- Education
- Work Experience

References






Review and Submit

The Process | Review and Submit

Charterholder and Regular Membership Application

 You have successfully submitted your application for membership. You may log in to [your account](#) to check the status of your application at any time.

Here's what happens next:

-  We will send an email to each of your professional references to ask for their recommendation.
-  Your references' responses will be added to your application when received.
-  Your application will be reviewed by CFA Institute and the selected CFA Society.
-  We will send an email to you when the review is complete or if we need additional information.
-  If your application is approved, you will receive information on how to finalize your membership.

[Explore My Account](#)

The Process | Application Status Check

Applicants navigate back to the “**Account Management**” dashboard and click the Membership tile and see the status of their current application. They cannot make changes to their application once it has been submitted. If they need to edit their application after it has been submitted, they can withdraw it from review.

Membership Applications

Manage Applications

Current Application

Regular Membership

Submitted: 15 June 2020

Status: Awaiting References

[View Details](#)

[View / Manage References](#)

[Withdraw](#)

2 Fruit Fly

fruit.fly@mailinator.com

Relationship: Other professional reference

Response Pending

Resend Request

Withdraw Request

Are you sure want to withdraw the reference?

Cancel Withdraw

Dragon Fly

What do the application statuses mean?

Use these definitions to understand the status of your application:

Not Completed: You started an application but have not submitted it.

Awaiting References: Your application was submitted, but we are awaiting responses from your references. Once we receive your references, we will review your application.

Under CFA / Society Review: Your application is being evaluated by CFA Institute and the society you applied to.

Approved: Your application for membership was approved. Membership may need to be activated by paying dues and/or filing the Professional Conduct Statement.

Not Approved: CFA Institute completed the review of your application, but membership requirements have not been met.

Withdrawn: Your application was withdrawn from review.

Lead Time | What to expect after you apply

CFA Institute may take up at least [5-10 business days](#) to review regular membership applications. When the final decision is made on an application, applicants will receive notification through email.

Subject: **Membership Application Approved: Join Now**
To: **leesa.gundy**
From: **info@cfainstitute.org**

Leesa Gundy,

Congratulations! You have been approved for Regular Membership of CFA Institute and CFA Society Virginia. [Join now](#) by completing your Professional Conduct Statement and paying dues.

Contact us at info@cfainstitute.org if you have any questions or concerns about your membership.

Regards,

CFA Institute

Subject: **Status of Your Membership Application**
To: **pepper.mint**
From: **info@cfainstitute.org**

Pepper Mint,

We were unable to approve your application for regular membership with CFA Institute and CFA Society Virginia.

Your application was carefully considered in accordance with our membership requirements and we have determined that it does not fulfill the requirements at this time. You can reapply through your [account](#) at any time.

Contact us at membership@cfainstitute.org if you have further questions.

Regards,

CFA Institute

Activate Your Membership

- Login to your CFA account and click Membership tile
- Verify your personal and professional information
- Complete the Professional Conduct Statement (PCS)
- Click the checkbox to the CFA Institute Membership Agreement
- Pay the dues (prorated dues scheduled for new members)

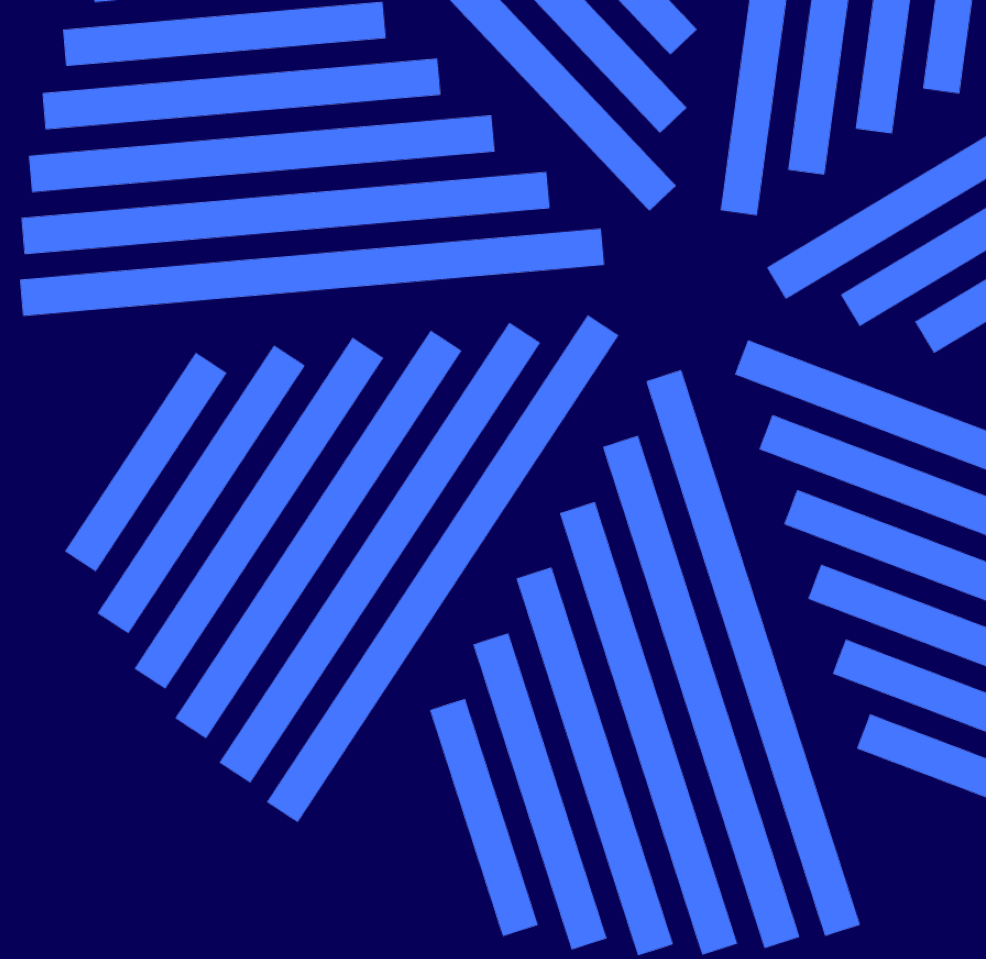
For example: New members who join in August 2025 pay only months remaining (11 months)*

- Checkout – Order confirmation (an example)

The screenshot displays the CFA Institute membership activation process. On the left, the 'Membership' section shows 'Manage Membership' with a 'Congratulations!' message: 'You have been approved for membership. The membership year runs from 1 July to 30 June. When you join as a new member, your dues will be adjusted to cover the current month through 30 June 2023.' It also includes a 'Finalize Membership(s)' button. The main area shows a 'Thank You!' message with the order number #S02801029006 and a 'Download Receipt' button. On the right, the 'Order Summary' table is shown:

Order Summary	
CFA Institute Dues	\$299.00
CFA Society Singapore.....	\$75.00
SubTotal.....	\$374.00
Tax or GST.....	\$0.00
Total	\$374.00
For new member (Aug 25) \$342.83	

New Charterholders Welcome Experience!



Printed CFA Charter



CFA Charterholders can expect to receive the printed charter in the next **six to eight weeks** upon the date of their confirmation submitted to CFA Institute.

For inquiry:

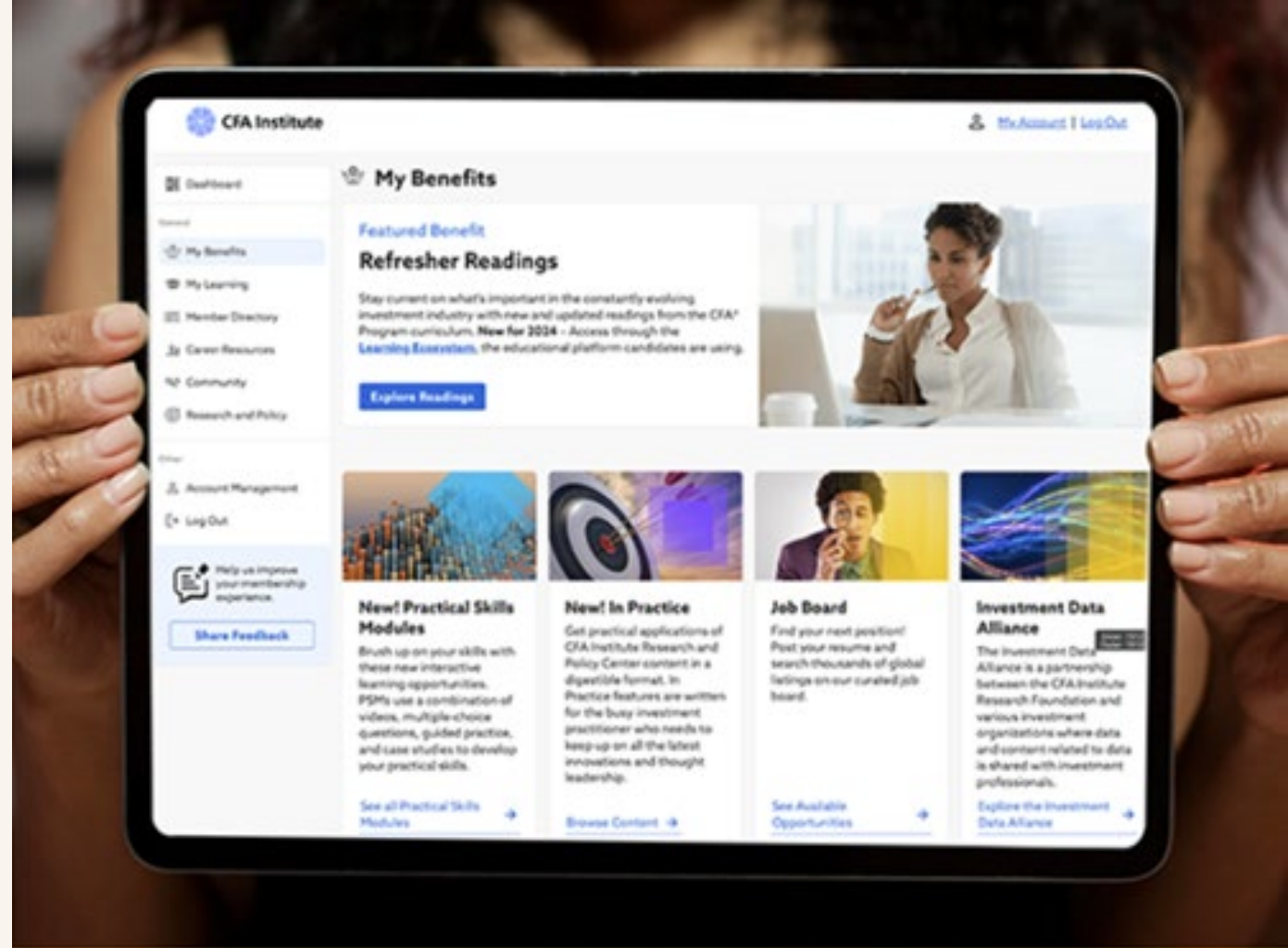
membership@cfainstitute.org for assistance
or janice.hon@cfainstitute.org for immediate support.

Stay tuned with your local society for **CFA Charter Award Ceremony** arrangement.

Digital Member Experience

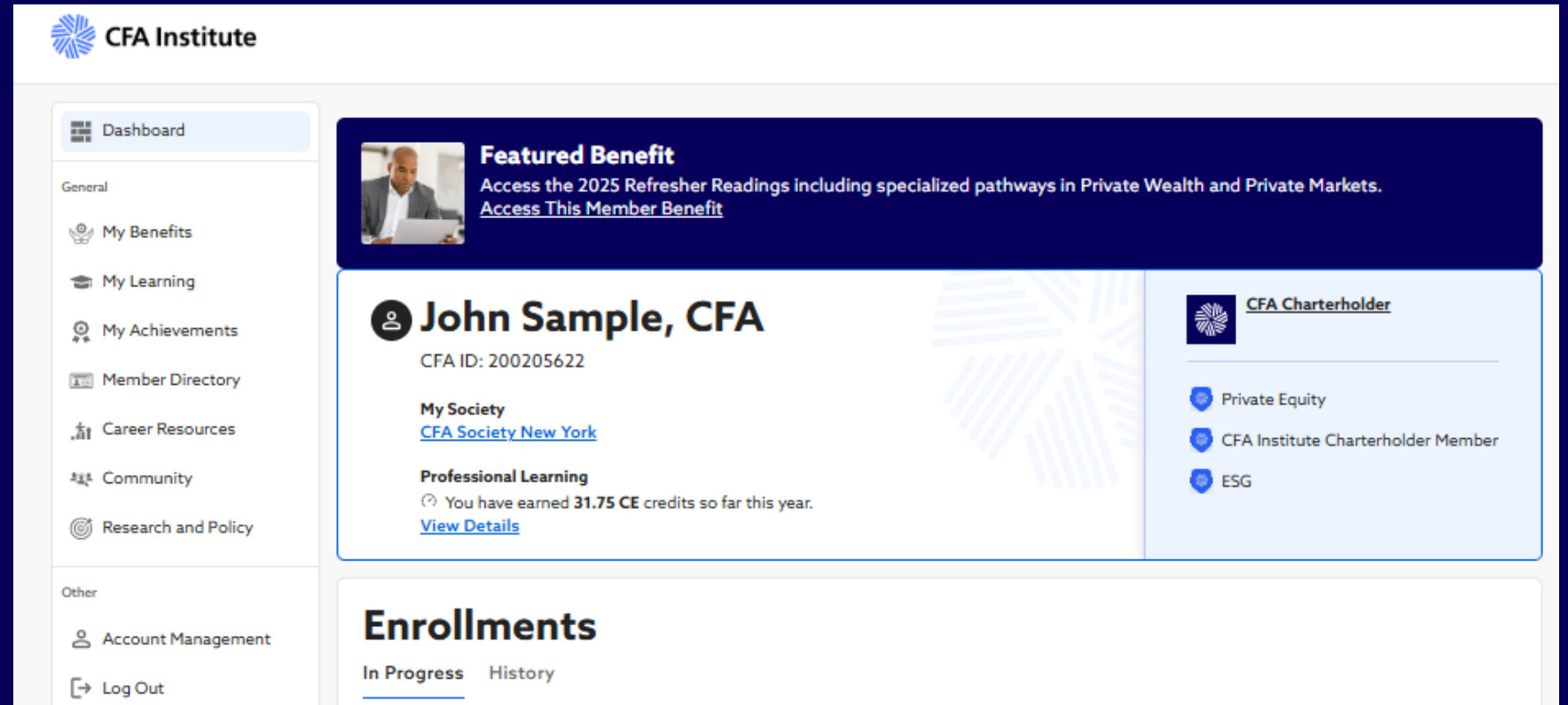
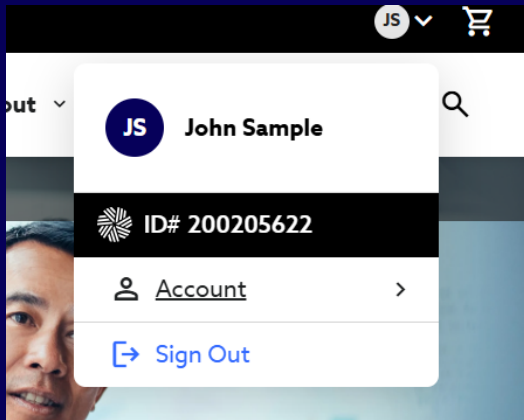
With this platform, members can easily find the full spectrum of benefits in one convenient place. With just one login, members can:

- Access valuable benefits and career resources
- Find exclusive CFA research, data and content
- Network and foster connections through societies
- Access and track their professional learning
- Engage with volunteer opportunities and communities
- Manage their membership and credentials



Your Member Dashboard

The **member dashboard** is an online platform where CFA Institute members can access key resources, manage their membership, and engage with professional development tools. [Member Experience](#)



My Benefits

Your membership allows you to enjoy the member benefits during the member year. Members are required to paying annual subscriptions and maintain their right to use the CFA® designation. Member year runs from **1 July through 30 June**.

CFA Institute My Account | Log Out

My Benefits

New! Member Exclusive
2025 Refresher Readings
Keep ahead with new CFA Program Refresher Readings, now featuring first-of-its-kind AI-generated audio, video, and knowledge quizzes to offer flexible, on-demand learning that fits seamlessly into every schedule.
New for 2025 -- Private Wealth and Private Markets Pathways.
[Explore Readings](#)

Practical Skills Modules
Brush up on your skills with these new interactive learning opportunities. PSMs use a combination of videos, multiple-choice questions, guided practice, and case studies to develop your practical skills.
New for 2025! Portfolio Construction
[View Practical Skills Modules](#)

2024 Compensation Study
With data from more than 17K CFA Institute members across 132 global markets, the 2024 CFA Institute Compensation Study provides you with benchmarks you can use to negotiate your own compensation package or set salaries for your staff.
[View Study](#)

In Practice
Get practical applications of CFA Institute Research and Policy Center content in a digestible format. In Practice features are written for the busy investment practitioner who needs to keep up on all the latest innovations and thought leadership.
[Browse Content](#)

Refresher Readings
Stay up to date with essential topics in the evolving investment industry with new, and for the first time ever, supporting AI-produced content to enhance CFA® Program Refresher Readings. New for 2025 - our Private Wealth and Private Markets Pathways, with accompanying AI audio, video, and knowledge quiz formats.
[Explore Readings](#)

Job Board
Find your next position! Post your resume and search thousands of global listings on our curated job board.
[See Available Opportunities](#)

Investment Data Alliance
The Investment Data Alliance is a partnership between the CFA Institute Research Foundation and various investment organizations where data and content related to data is shared with investment professionals.
[Explore the Investment Data Alliance](#)

getAbstract
Access getAbstract, a comprehensive library of compressed knowledge for you to apply efficiently with time-saving 15-minute summaries to help you develop and enhance your job-related competencies, as well as support your personal development.
[Access getAbstract](#)

Financial Analysts Journal - Digital Edition
Access the latest peer reviewed research for financial practitioners. Since 1945, the Financial Analysts Journal has advanced the knowledge and understanding of investment management.
[Browse the Archive](#)

Ethics Learning Lab
Advance your knowledge and gain practical skills through structured learning and exclusive content curated by leading practitioners.
[Learn More](#)


Morningstar Stocks, Bonds, Bills, and Inflation (SBBi) Dataset
Get monthly, quarterly and yearly total returns and yields of most of the major US asset classes, complimentary with your CFA Institute membership.
Offered by the Investment Data Alliance
[Access Morningstar Data](#)

FactSet
Select datasets with complimentary access: FactSet Global Prices and Corporate Actions, FactSet Fundamentals (Basic) and FactSet Estimates (Basic).
Offered by the Investment Data Alliance
[Access FactSet Data](#)

Calcbench
Calcbench is designed for deeper fundamental research. Access data from 10-Ks, 10-Ks, and earnings releases. With Calcbench's direct access to the SEC's corporate financial data, instantly and systematically process financial data, including details within the footnotes, for thousands of firms.
Offered by the Investment Data Alliance
[Access Calcbench Data](#)

My Learning

Earn continuing education (CE) credits while you access content in the knowledge center and sample course content from our latest certificate offerings. It's important part of our Code of Ethics and Standards of Professional Conduct. We recommend that members complete a minimum of 20 professional learning credits that include 2 Standard, Ethics, and Regulations (SER) credit each year.

My Account | Log Out


- Dashboard
- General
 - My Benefits
 - My Learning**
 - My Achievements
 - Member Directory
 - Career Resources
 - Community
 - Research and Policy
- Other
 - Account Management
 - Log Out


Share your ideas to improve your membership experience!
[Share Feedback](#)

My Learning

Knowledge Center


Earn continuing education (CE) credits while you access content in the knowledge center and sample course content from our latest certificate offerings. It's all part of our pledge to keep you at the forefront of your field and help advance your career.





Continuing Education

Overall Progress



Credits Overview
1 July 2024 - 30 June

PL Credits earned
SER Credits earned

■ PL Credits ■ SER Credits

Your Items

All items limit one per customer.

Item	Price	Quantity	Item Total
Private Markets and Alternative Investments Certificate Remove	USD 890.00 Log in for member price	1	USD 890.00

My Achievement

Explore your CFA Institute achievements! Delve into a thoughtfully curated collection that showcases your well-earned accomplishments and celebrates your success as you drive the future of the industry forward.

The image shows a screenshot of the CFA Institute's 'My Achievements' page. On the left is a navigation menu with options like Dashboard, My Benefits, My Learning, My Achievements (highlighted), Member Directory, Career Resources, Community, Research and Policy, and Account Management. The main content area is titled 'My Achievements' and features a 'CFA Charter' section. This section includes a description of the charter as a prestigious qualification and two buttons: 'Download Verification Letter' and 'Share your Charter', with the latter circled in red. To the right of this section is a large graphic of a CFA Charter for 'JOHN SAMPLE, CFA', awarded in 1872. Further right is a sample of the official CFA Institute certificate, which is a formal document with cursive text and the CFA Institute logo.

My Achievement (continued)

Explore your CFA Institute achievements! Delve into a thoughtfully curated collection that showcases your well-earned accomplishments and celebrates your success as you drive the future of the industry forward.

Programs & Certificates

Courses & Badges

ESG Certificate
YOUR NAME HERE
CFA Institute®
Certificate
ESG
[View Certificate](#)

Private Equity Certificate
Award Date: 17 Apr 2025 • ID

CFA Institute Charterholder
Award Date: 05 Sep 2024 • ID

CFA Institute Certificate
This certificate
Private Equity
Has been awarded to
John Sample
Date
April 17, 2025
Certificate number
140284327
Maynard J. Smith
President and CEO

Private Equity
CFA Institute
[SHARE](#) [PDF](#) [BADGE](#) [EMAIL](#) [HELP](#) [MORE](#)

Sign in to access more options

John Sample
[View All Credentials](#)

Share Credential
Show this credential on your social network

[in](#) [f](#) [X](#) [G](#) [⋮](#)

[Add to My LinkedIn Profile](#)

Verification Letter

As part of our efforts to better serve the needs of our members, we have implemented a self-service verification letter process. Individuals who are an active CFA Institute member, CFA Institute Charterholder, or CFA Program participant can generate and download verification letters to prove their status with CFA Institute.

CFA Institute

Dashboard

General

- My Benefits
- My Learning
- My Achievements**
- Member Directory
- Career Resources
- Community
- Research and Policy

Other

- Account Management

My Achievements

Discover your CFA Institute Achievements. Dive into a curated collection highlighting your well deserved accomplishments as you shape the future of the industry!

CFA Charter

As a Chartered Financial Analyst (CFA) you are part of an elite group of industry professionals who successfully completed what is widely considered one of the most prestigious and rigorous qualifications in the industry. Use the link below to generate a verification letter of your designation.

[Download Verification Letter](#)

[Share your Charter](#)

CFA Institute

13 May 2025

To whom it may concern:

This letter confirms that John Sample is an **active** CFA Institute Member as of 13 May 2025.

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organization is a champion for ethical behavior in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow. Our more than 180,000 members have access to a global network of professionals and to benefits that help them pursue professional knowledge, advance their careers, and lead with ethics.

For more information about CFA Institute membership, visit: cfainstitute.org/en/membership.

If you should have any further questions, please feel free to contact our Global Contact Center via our Customer Support page: profile.cfainstitute.org/ContactUs.

Sincerely,
Global Contact Center

The Board of Governors of CFA Institute
Chartered Financial Analyst
designation to
Jonathan Sample No
for fulfilling all the requirements prescribed,
subject to fulfilling the ongoing obligations of
This charter is issued at Charlotte
this first day of September
Charter Number 12345

David G. ...
Chair, Board of Governors

Career Resources | Job Board

The CFA Institute Job Board connects CFA members and candidates with exclusive finance opportunities, helping them advance their careers within the CFA network.

CFA Institute [My Account](#) | [Log Out](#)

Dashboard

General

- [My Benefits](#)
- [My Learning](#)
- [My Achievements](#)
- [Member Directory](#)
- [Career Resources](#)**
- [Community](#)
- [Research and Policy](#)

Other

- [Account Management](#)
- [Log Out](#)

Share your ideas to improve your membership experience!
[Share Feedback](#)

Career Resources

2024 CFA Institute Compensation Study

With data from more than 17K CFA Institute members across 132 global markets, the 2024 CFA Institute Compensation Study provides you with benchmarks you can use to negotiate your own compensation package or set salaries for your staff.

[View Study](#)

The Competency Framework

The competency framework provides you with guidance on the skills and knowledge needed to develop in your existing job role or transition into a new job role. At CFA Institute, we use it to inform the ongoing development and relevance of the CFA Program and our Professional Learning activities.

[View Interactive Map](#) →

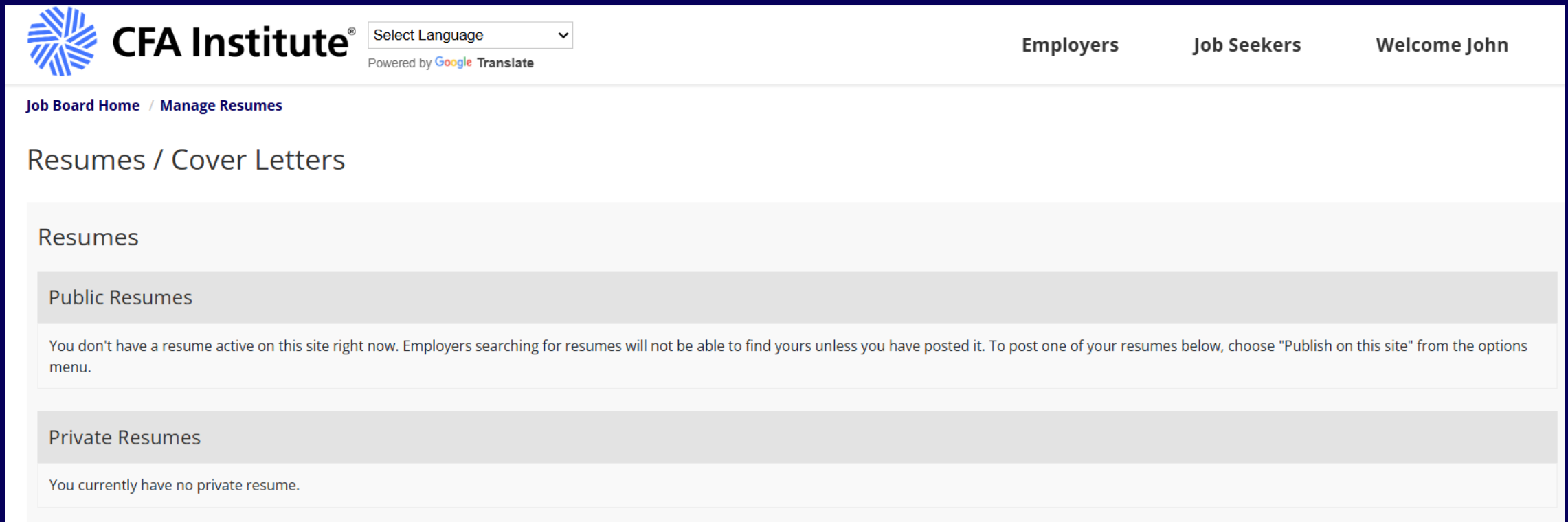
Job Board

Browse job listings, create a dynamic profile, save job search alerts, and apply directly for jobs.



[View Job Board](#) →

Job Board | Manage Resume

Managing your resume on the CFA Institute Job Board helps you stand out to potential employers and ensures you're ready for new opportunities.



The screenshot shows the CFA Institute Job Board interface. At the top left is the CFA Institute logo and a language selection dropdown menu. The navigation bar includes links for 'Employers', 'Job Seekers', and a user greeting 'Welcome John'. The breadcrumb trail indicates the user is in 'Job Board Home / Manage Resumes'. The main heading is 'Resumes / Cover Letters'. Under the 'Resumes' section, there are two categories: 'Public Resumes' and 'Private Resumes'. The 'Public Resumes' section contains a message stating that no resumes are currently active and providing instructions on how to post a resume. The 'Private Resumes' section contains a message stating that no private resumes are currently listed.

CFA Institute® 
Powered by  **Google Translate**

[Job Board Home](#) / [Manage Resumes](#)

Resumes / Cover Letters

Resumes

Public Resumes

You don't have a resume active on this site right now. Employers searching for resumes will not be able to find yours unless you have posted it. To post one of your resumes below, choose "Publish on this site" from the options menu.

Private Resumes

You currently have no private resume.

Community

Stayed Connected through the CFA Community!

The screenshot displays the CFA Institute website's community interface. On the left, a navigation sidebar includes links for My Benefits, My Learning, My Achievements, Member Directory, Career Resources, Community, Research and Policy, Account Management, and Log Out. The main content area features a 'Community' header with a navigation menu (Communities, Volunteer, FAQs) and a dropdown menu for 'All Communities'. Below this, there are two featured articles: 'Room to Grow ... with Mushroom Farming' and 'Charterholders Making Headlines Globally'. A 'Share Feedback' button is located at the bottom left. The 'Get Involved in the CFA Community' section highlights three options: 'CFA Societies', 'Volunteer' (highlighted with a red box), and 'Members-Only LinkedIn Group'. On the right, a 'LATEST ANNOUNCEMENT' section features a message from Margaret Franklin, CFA, dated 3 months ago, with a 'WATCH NOW' link and a 'See All Announcements' button. Below the announcement, a 'Welcome Back John Sample!' message is displayed. The 'All Communities' filter is active, showing 2 total communities. The first community is 'CFA Institute Café', which is open to all community types and has 523 threads, 17 libraries, and 14K members. The second community is 'Sustainable Investing Community', which is a members-only group and has 34 threads, 11 libraries, and 38.2K members.

Research and Policy

The CFA Institute Research Foundation is a not-for-profit organization that sponsors independent research for investors and investment professionals around the world.

The screenshot shows the CFA Institute Research and Policy Center dashboard. At the top left is the CFA Institute logo. On the right, there are links for "My Account" and "Log Out". A left-hand navigation menu includes "Dashboard", "General" (My Benefits, My Learning, My Achievements, Member Directory, Career Resources, Community), "Research and Policy" (highlighted), and "Other" (Account Management, Log Out). A feedback box at the bottom left says "Share your ideas to improve your membership experience!" with a "Share Feedback" button. The main content area is titled "Research and Policy" and "Recent Research from the Research and Policy Center". It features four research items: a report on "An Investment Perspective on Tokenization – Part II", an article in the "Financial Analysts Journal, Second Quarter 2025, Vol. 81 No. 2", a comment letter "Letter to Congress Opposing Elimination of PCAOB", and an issue brief "A Comprehensive Guide to ETFs (2nd Edition)". Below this is a section for the "FINANCIAL ANALYSTS JOURNAL", describing it as the official journal of CFA Institute, with a "View latest issue" button and a link to "Financial Analysts Journal, 2025, Vol. 82 Issue. 2".

[Subscribe to CFA Institute Research and Policy Center \(RPC\)](#)

Stay informed on the latest from the RPC

Sign up to get the latest updates from the RPC right to your inbox

Subscribe here

CFA Institute Research Foundation

The CFA Institute Research Foundation accepts donations to support independent, high-quality research for investment professionals. Contributions help fund research publications and initiatives that advance ethics, education, and professional excellence in the financial industry.



The screenshot shows a donation form for the CFA Institute Research Foundation. At the top left is the logo, which consists of a stylized sunburst icon and the text "CFA Institute Research Foundation". Below the logo is a paragraph explaining the mission: "The mission of the Research Foundation is to fund and publish high-quality, independent research relevant to the global investment community. Your support helps us freely distribute this content and improve the knowledge base of investment professionals worldwide." Below this is the question "I will support the mission of the Research Foundation with my donation of:" followed by six radio button options: "USD 0", "USD 10", "USD 25", "USD 50", "USD 100" (which is selected), and "USD 250". Below the amount options is the question "How should we identify your donation?" with three radio button options: "Show my Name" (selected), "Anonymous", and "Donate on behalf of:". Under the "Donate on behalf of:" option is a text input field with the placeholder text "Name or business name *".

Account Management

From the “**Account Management**” dashboard, please click on the “Profile” to edit your privacy settings.

The image shows two screenshots from the CFA Institute website. The left screenshot is the 'Account Management' dashboard, and the right screenshot is the 'Privacy Settings' page.

Account Management Dashboard:

- Navigation:** Dashboard, General (My Benefits, My Learning, My Achievements, Member Directory, Career Resources, Community, Research and Policy), Other (Account Management, Log Out), and a 'Share Feedback' button.
- Profile:** Update your personal information and address. [Manage Profile](#) →
- Scholarships:** Manage your CFA Institute scholarships. [Manage Scholarships](#) →
- Membership:** Manage your CFA Institute and local CFA society memberships. [Manage Membership](#) →

Privacy Settings:

The following are optional fields you may add to your Directory Profile. Select the visibility setting you prefer for each field.

Professional Information	Visibility
CIPM Designation Earned 15 November 2019	Only Members
Job title Special Investigator Edit	Only Members
Occupation Other (please specify) Edit	Only Members
Current Employer CFA Institute Edit	Only Members
LinkedIn public profile URL Edit	Only Members

Thank you

For any additional questions, please email
Ms. Janice Hon

Janice.hon@cfainstitute.org

