

## Applicant Information

(Information in bold is required. Please print.)

**CFA Institute Candidate #:** \_\_\_\_\_

**Name:** \_\_\_\_\_

**Home Street Address:** \_\_\_\_\_  
\_\_\_\_\_

**Home City, State Zip:** \_\_\_\_\_

Company: \_\_\_\_\_

Work Street Address: \_\_\_\_\_

Work City, State, Zip: \_\_\_\_\_

**Home Telephone Number:** \_\_\_\_\_

Work Telephone Number: \_\_\_\_\_

**Email (preferred):** \_\_\_\_\_

Email (secondary): \_\_\_\_\_

**Payment Method:** (circle one)

Visa      Mastercard      American Express

Discover      Check

*Please make checks payable to CFA Society of Chicago.  
No money orders accepted.*

**Cardholder Name:** \_\_\_\_\_

**Billing Street Address:** \_\_\_\_\_  
\_\_\_\_\_

**Billing City, State, Zip:** \_\_\_\_\_

**Card Number:** \_\_\_\_\_

**Expiration Date:** \_\_\_\_\_

**Signature:** \_\_\_\_\_

**Please send completed application to:**

CFA Society of Chicago  
134 N. LaSalle St. – Suite 1740  
Chicago, IL 60602  
Fax: 312-251-1303  
Scan and email to [info@cfachicago.org](mailto:info@cfachicago.org)



## About Us

The CFA Society of Chicago (CFA Chicago), founded in 1925, is the oldest investment analysts society in America. CFA Chicago is a non-profit, member organization that works on behalf of nearly 4000 local professionals from a variety of investment disciplines.

Investment research analysts, investment counselors, portfolio and pension managers, economists, educators, and candidates have joined CFA Chicago to learn, teach, network, share and grow.

The purpose of the CFA Society of Chicago is to meet the professional needs of its members: Chartered Financial Analyst designees and other investment professionals. CFA Chicago serves these needs by:

- creating programs, disseminating information, and providing services of direct benefit to members;
- promoting adherence to the highest ethical and professional standards; and
- fostering a culture of inclusion, diversity, and respect among investment professionals.



## Benefits of Membership

Investment professionals recognize the importance of keeping pace with the constantly changing investment industry. Membership provides the knowledge, recognition and industry network needed to make a positive impact on your career.

**The benefits of membership include:**

- CFA Exam Support:** CFA Chicago offers members invaluable resources and support to help candidates successfully prepare for and pass the CFA Exam.
- Discounted Stalla Preparatory Courses for CFA Exam
  - FREE Mock Exam (in partnership with Stalla) and Discount on Mock Exam Review
  - Comprehensive Study Scholarships for the CFA Exam
  - Study Groups
  - Post-Exam Party

- Programs:** CFA Chicago presents diverse programming content, including: luncheon programs featuring top industry speakers; educational and career management seminars on specialized, timely topics; gatherings addressing the unique challenges facing women in the industry; and social outings such as happy hours and sporting events.
- 2 Complimentary Event Tickets
  - Discounted Member Rates and Members-Only Events
  - Networking Opportunities

- Professional Development:** CFA Chicago extends members access to exclusive on-line job postings for the industry's most lucrative career openings and 24/7 networking opportunities via the CFA Community.
- Robust Job Posting Board
  - Interactive CFA Community, CFA Chicago's online social networking platform which empowers members and fosters meaningful interaction
  - Complimentary, members-only Job Fair

- Volunteer Opportunities:** CFA Chicago provides members with volunteer opportunities in all of its Advisory Groups.
- Plan and execute events
  - Assist in implementing strategic goals
  - Contribute to society's growth by providing operational support



## Costs and Application Process

You are NOT a member of CFA Chicago until you complete a member application and pay dues. Enrollment in the CFA Program is independent from membership and member benefits. CFA Chicago Candidate Membership is a LOCAL membership only.

For information about CFA Institute, please visit: [www.cfainstitute.org](http://www.cfainstitute.org). You will need to apply for Regular Membership with CFA Institute and CFA Chicago in order to receive your Charter.

### Costs

\$150 (Dues are collected by CFA Chicago and are not pro-rated)

### Eligibility

- Level II or Level III candidate and
- CFA program activity within the previous 5 years and
- No CFA Institute sanctions for professional misconduct

*NOTE: You do not need to be enrolled for the next exam to be eligible for a Candidate Membership. You must simply have an active candidate number.*

### Requirements

- Adhere to all policies set forth in the Candidate Responsibility Statement signed when entering the CFA program and
- Submit application and payment



## Build Your Knowledge Base

As a candidate in the CFA Program™, you have demonstrated a commitment to a career in investment management. CFA Chicago understands the complexities and demands of this process, and our goal is to support you every step of the way.

Join a network of nearly 4000 local, like-minded people who share your professional values.

Limited member slots available for Candidate Members, so apply today! Applications available at [www.cfachicago.org](http://www.cfachicago.org).

## CFA: The Gold Standard

“The Chartered Financial Analyst (CFA) qualification is roughly equivalent to a specialized postgraduate finance degree, including a mixture of economics, ethics, law, and accountancy. It is much liked by employers in financial services. Whereas there are tens of thousands of finance degrees available around the world, ranging from the excellent to the worthless, there is only one CFA, managed and examined by an American association of financial professionals, the CFA Institute.”

- The Economist, 2/26/2005



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# The of Candidate Membership



[www.cfachicago.org](http://www.cfachicago.org)



## Candidate Membership Application

To join CFA Chicago as a Candidate Member, you must be enrolled in the CFA Program™ and have an active candidate number.

Candidate Membership dues are \$150 per year. Dues are not pro-rated. Applications received after April 1 will be held until July 1 and considered for the following fiscal year.

Limited membership slots available for Candidate Members, as determined by the CFA Chicago Board of Directors each June. You will be notified if your application has been accepted.