

FREQUENTLY ASKED QUESTIONS ABOUT MEMBERSHIP

You **MUST** be a CFASF member at time of registration in order to be eligible for member prices. Registering with CFA Institute to take exam **DOES NOT** mean you are a member of CFASF.

Q Do you recommend Level I candidates apply for membership to CFASF?

CFASF recommends that you wait until you are closer to earning your charter - at the very least, you should wait until you pass the Level I exam. This way, you do not have to take an additional Ethics exam.

Q What is involved in applying for membership?

Applying for membership requires sponsors and work experience verification, and therefore can take up to 90 days to be accepted once you have submitted your application. Membership costs more than the \$100 you save on the course (actual cost depends on what part of the year you join). And if you have not passed the Level I exam, you must also pass an ethics exam.

Q Can I get a refund if I become a member?

You may register as a non-member, and if you become a member before the start of class, you may then apply for a refund for the price difference. Please remember that it can take up to 90 days to become a member and that no refunds are given to candidates who become members after the course begins.

Q I have just applied for membership. Should I register and apply for a refund or wait and register when I am a member?

If you wait, there is no guarantee that there will be a space when you want to register. Waiting runs the risk that no spots will be available, so it is a risk you must weigh.

Q How can I check my membership application status?

Inquire with CFA Institute by email: info@cfainstitute.org.

Q I registered as a non-member, but was accepted as a CFASF member before the course started. How do I apply for a refund?

Please email your name, the title of the course you are taking and your request for a refund due to your change in membership status to Linda Lam at Candidates@CFASanFrancisco.org.