

CFA 考试报名流程

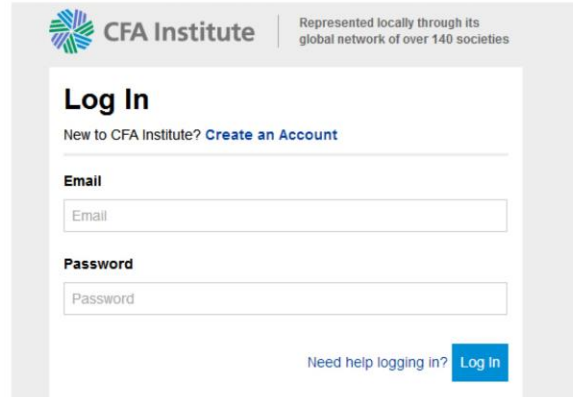
以第一次报名为例，二次报名步骤雷同，

需要最新CFA FRM资料、押题联系微信：AMA940906

考生只要有支付的信用卡即可报名，信用卡不一定是自己的！

首先打开报名网址：https://www.cfainstitute.org/finsecustomer_en

- 如果您有账号直接输入账号和密码点击 Log In 进行登陆。
- 如果您没有账号或第一次使用请点击 create an account 创建账号

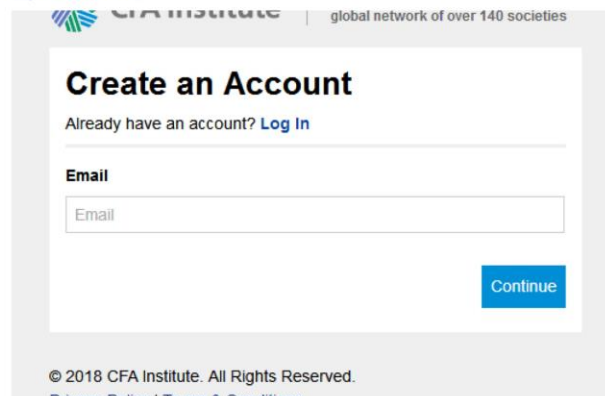


The image shows the CFA Institute login page. At the top, there is the CFA Institute logo and the text "Represented locally through its global network of over 140 societies". Below this, the heading "Log In" is displayed. Underneath, it says "New to CFA Institute? [Create an Account](#)". There are two input fields: "Email" and "Password". At the bottom right, there is a blue button labeled "Log In". To the left of the button, it says "Need help logging in?".

需要最新CFA FRM资料、押题联系微信：AMA940906

注册 CFA 账号详细步骤如下：

- 点击 create an account 创建账号，请输入一个常用的 Email 地址然后点击 continue。



The image shows the CFA Institute "Create an Account" page. At the top, there is the CFA Institute logo and the text "global network of over 140 societies". Below this, the heading "Create an Account" is displayed. Underneath, it says "Already have an account? [Log In](#)". There is one input field labeled "Email". At the bottom right, there is a blue button labeled "Continue". At the very bottom, there is a copyright notice: "© 2018 CFA Institute. All Rights Reserved. Privacy Policy Terms & Conditions".

- 输入姓名并设置登陆密码并完善当前页面的 所有内容，点击 **Create Account** 创建账号即可。

Name 需要最新CFA FRM资料、押题联系微信：AMA940906

Given Name First Name	<input type="text" value="Given Name (First Name)"/>
Family Name Last Name	<input type="text" value="Family Name (Last Name)"/>

名字请严格按照护照上信息填写，**First Name** 是名，**Last Name** 是姓，不区分大小写，建议首字母大写

Password

- Must be 8-30 characters long
- Must use letters (A-Z) and numbers. These characters are also allowed: ! # \$ %
- Must include one uppercase letter, one lowercase letter, and one number
- Do not use the following phrases: password, 123456, pass1234, 1234pass, or qwerty
- Do not use your family or given name

Password	<input type="password" value="Password"/>	<ul style="list-style-type: none">✓ 8-30 allowable characters✓ 1 capital letter✓ 1 lowercase letter✓ 1 number✓ passwords match
Confirm Password	<input type="password" value="Confirm Password"/>	

Security Question

Question	<input type="text" value="Select a Security Question"/>
Answer	<input type="text" value="Security Question Answer"/>

By creating an account with CFA Institute you agree to abide by the [CFA Institute Privacy Policy](#) and website [Terms and Conditions](#).

	<input type="button" value="Get a new code"/>	<input type="button" value="Listen to the code"/>
Enter the code above		
<input type="text" value="Enter the code above"/>		

Create Account

报名考试详细步骤：

- 创建账号成功后页面会跳转到首页，然后点击 Programs,选择下方的 CFA Program 进行点击进入。

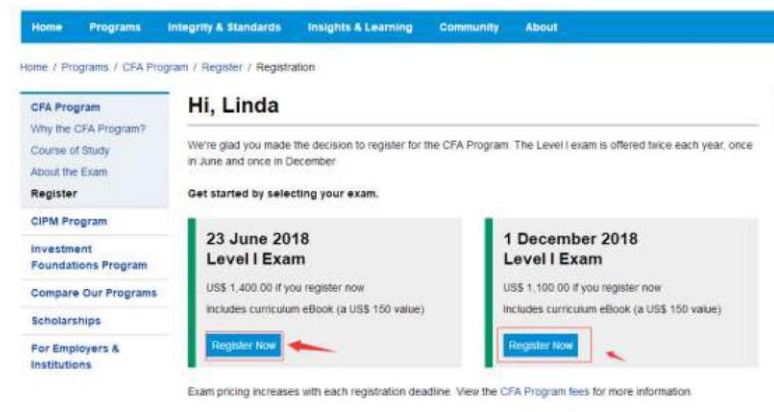


- 进入后点击 register for the exam 进入选择您准备报考的科目页面。

需要最新CFA FRM资料、押题联系微信：AMA940906



- 进入后选择您学员报考的科目，然后点击下方的 Register Now



- 选择对应的国家，然后正确填写通讯地址点击 Save and Continue。

Where Do You Live?

Country / Region: China [Choose a different Country / Region](#)

Business / Building Name:

Address Line 1*:

Address Line 2:

City*:

Province / Municipality*:

Postal Code*:

[Save and Continue](#)

- 进入新的页面后继续点击 provide additional personal information

We Need More Information

In order to offer the CFA Program in China, we need to collect additional personal information from CFA Program candidates residing in China.

Please [provide additional personal information](#) in order to continue your registration.

[Save and Continue](#)

- 进入后填写联系电话，中文姓名和护照号码最后点击 Save and Continue.

Contact Information

Primary Phone Number*:

No dashes, spaces, or other punctuation

Country / Region Code:

Phone Number:

Identification Information

Full Name in Chinese*:

中文姓名

International Travel Passport Number*:

Include all letters and numbers

[Save and Continue](#)

- 选择您需要报考的城市，点击 Save and continue 进入下一步。

Home Programs Integrity & Standards Insights & Learning Community About

Home / Programs / CFA Program / Register / Registration

Test Center Location

Choose your test center location below. You will receive your test center address approximately one month before your exam.

Choose a Country / Region

China

We have 10 test center locations in CHINA

Beijing, CHINA

- 确认考试城市后，进入新的页面填写详细护照等相关信息，然后点击 **Save and continue**.

需要最新CFA FRM资料、押题联系微信：AMA940906

Country of Issuance* Select a Country of Issuance *选择护照签发国家

Last Four Characters of Passport Number* Last Four Characters of Passport Number *填写护照号码最后四个字符，通常为数字

Passport Expiration Date* Day Month Year *护照到期日，按照护照上面填写日、月、年

International Travel Passport Name Enter your name exactly as it appears on your international travel passport, in English. *护照到期日，按照护照上面填写日、月、年

Given Name* First Name Given Name (First Name) *名字相关信息按照护照上面填写即可，必须确保一致

Middle Name Middle Name *在斯拉夫国家，middle name是父名之意。例如列宁全名是弗拉基米尔·伊里奇·列宁，伊里奇是父名。在欧美国家，middle name是中名，一般取长辈的名字。例如克林顿全名是威廉·杰斐逊·克林顿，杰斐逊是一位美国的民主奠基者，父母取这个名字来致敬小克林顿。

Family Name* Last Name Family Name (Last Name) *按照护照填写即可

Suffix Suffix *非必填

Gender Female Male Prefer Not To Say

Date of Birth* Day Month Year *出生日期，同样按照护照填写。保存并继续填写下一页！

- 根据自身情况选择对应的资格进行完善所有信息点击 **Save and continue**.

Entrance Requirements

To register for your exam, you must meet one of the following entrance requirements.

★欲报名参加考试时，你必须满足以下入学条件之一。选择你已经满足的条件和相关信息。

Select how you qualify*

- I have completed a bachelor's degree or equivalent program. Does my degree qualify?
 - 已经完成了学士学位或同等学历课程。（本科毕业、读研、读博）
- I am a student in my final year of a bachelor's degree or equivalent program.
 - 是一名学士学位或同等学历毕业后一年即将毕业的考生。（中国本科生毕业前18个月即可）
- I have 48 months of full-time professional work experience or full-time professional work experience and undergraduate education.
 - 有48个月的全职专业工作经验或全职专业工作经验和本科以上学历。

If you have any questions, please contact us. （学历+工作经验=48个月的人群即可，无专业要求）

Where did you complete your bachelor's degree or equivalent program?

Graduation Year*

Select a Graduation Year

University Name*

University Name

Qualify a different way [Save and Continue](#)

Step 5 of 11

- Exam
- Address
- Test Center Location
- International Travel Passport
- Entrance Requirements**
- Employment Status
- Professional Conduct History
- Candidate Agreement
- Curriculum Format
- Payment
- Review

★填写必填项：毕业年度、大学名称，保存并继续下一步！

➤ 根据目前的就业状态进行选择，然后点击 Save and Continue.

Employment Status

★根据自己目前的状况填写

What is your primary employment status?*

- Employed full-time ●全职聘请
- Employed part-time ●兼职就业
- Student ●学生
- Unemployed ●失业
- Retired ●退休

[Save and Continue](#)

Step 6 of 11

- Exam
- Address
- Test Center Location
- International Travel Passport
- Entrance Requirements
- Employment Status**
- Professional Conduct History
- Candidate Agreement
- Curriculum Format
- Payment
- Review

➤ Professional Conduct Inquiry 这一步，新生为 9 个问题，老生为 10 个问题，全部选择 No，然后点击 Save and continue.

[Home](#)
[Programs](#)
[Integrity & Standards](#)
[Insights & Learning](#)
[Community](#)
[About](#)

Home / Programs / CFA Program / Register / Registration

CFA Program

Why the CFA Program?

[Course of Study](#)

About the Exam

Register

CIPM Program

Investment Foundations Program

Compare Our Programs

Scholarships

For Employers & Institutions

Professional Conduct Inquiry

The Professional Conduct Program's role is to protect the integrity of CFA Institute and its professional designation programs. As a candidate, you will be expected to uphold our high ethical standards.

If you have any questions about the professional conduct inquiry, please contact the Professional Conduct department.

需要最新CFA FRM资料、押题联系微信：AMA940906

Suspension

Are you currently, or within the last five years have you been, temporarily suspended by a regulatory organization or judicial court from participation in the financial services markets or from association with a financial services institution?

☐ Yes, I am currently or have recently been temporarily suspended.
 ☒ No

1 of 9

➤ 跳转到以下页面请选中前面方框即可，然后点击 **Save and Continue**.

☒ I understand, accept and agree to comply with the terms of the Candidate Agreement, as amended by CFA Institute from time to time. I understand that CFA Institute has the authority to void my exam results, and reject, suspend or terminate my candidacy at any time for my failure to comply with the Candidate Agreement.

Save and Continue

➤ 选择电子 or 纸质版教材

Curriculum Format

eBook

All candidates get access to the eBook as part of their registration.

This digital version of the curriculum can be viewed on your computer, most tablets, e-readers, Android devices, and iPhones.

eBook

Print + eBook

An additional
US\$ 150
+ US\$ 20 shipping

Purchase a printed copy of the eBook curriculum for an additional charge.

You'll still get the eBook, so you can start studying while we ship your print curriculum.

Print + eBook

✖ 选择课程形式

*电子书

CFA考试报名完成后24小时发送你的注册时的邮箱，所以电子版也是必选项。

这个电子版本的教材可以在大部分电脑，平板电脑，电子阅读器，Android设备和iPhone上观看。

*打印+电子书

150美元+20美元运费

购买纸质版本需要本额外付费，同时也可以获得电子书，这样你就可以开始学习，CFA协会将安全运送打印教材给您。

Step 9 of 11

☒ Exam
 ☒ Address
 ☒ Test Center Location
 ☒ International Travel Passport
 ☒ Entrance Requirements
 ☒ Employment Status
 ☒ Professional Conduct History
 ☒ Candidate Agreement
 ☒ Curriculum Format
 ☐ Payment
 ☐ Review

- 确认好教材后进入 Exam Preparation Providers 此项，选择 No 即可。然后点击 Save and continue.

The screenshot shows the CFA Institute website's registration process. On the left is a navigation menu with links like 'CFA Program', 'Why the CFA Program?', 'Course of Study', 'About the Exam', 'Register', 'CIPM Program', 'Investment Foundations Program', 'Compare Our Programs', 'Scholarships', and 'For Employers & Institutions'. The main content area is titled 'Exam Preparation Providers'. It contains a paragraph about the Approved Prep Provider (APP) Program and a question: 'Would you like to receive information about additional exam preparation opportunities?'. Below this question are two radio buttons: 'Yes' (selected) and 'No'. At the bottom right of the main content area is a 'Save and Continue' button.

- 确认所有费用后，输入信用卡详细信息进入付款。

The screenshot shows the 'Payment' section of the CFA Institute website. It features a table of fees: Level I CFA Examination Registration (US\$ 675.00), CFA Exam Enrollment June 2015 (US\$ 450.00), Level I eBook Curriculum June 2015 (US\$ 150.00), Shipping (US\$ 0.00), Estimated Tax or VAT (US\$ 0.00), and Subtotal (US\$ 1275.00). Below the table is a 'Payment Method*' section with two options: 'Credit Card' (selected) and 'Wire transfer, ACH, check, money order, or postal order'. The 'Credit Card' section includes fields for 'Credit Card Number*', 'Cardholder Name*', and 'Expiration Date*'. To the right of the payment section is a vertical list of steps, with 'Payment' highlighted. At the bottom right of the payment section is a 'Save and Continue' button.

※ 信用卡相关信息说明：


- 1、支付前确认信用卡的额度足够
- 2、双币信用卡支付可以借用他人或者自己的
- 3、建行、招行、浦发信用卡相对比较好用
- 4、双币信用卡支付无需支付密码，无需网银

【最后一步提交即可，接下来可以在协会官网查询报名结果~】

GOOD LUCK~

需要最新CFA FRM资料、押题联系微信：AMA940906

如您已经完成了以上所有步骤，说明您已经报名并付款成功，如需要查询或下载报考信息可以进入账号点击 [Download an itemized receipt](#)，下载账单即可

 CFA Institute

EmployersUniversitiesPreparation

HomeProgramsIntegrity & StandardsInsights & LearningCommunityAbout

Home / Programs / CFA Program / Register / Registration

CFA Program

Why the CFA Program?

Course of Study

About the Exam

Register

CIPM Program

Investment Foundations Program

Compare Our Programs

Scholarships

For Employers & Institutions

Thank You for Registering for CFA Program

Registration Summary

- Your exam date is **23 June 2018**.
- Your test center location is **Sydney, AUSTRALIA**.
- You selected the **eBook** curriculum.

In the next 24 hours, you'll receive an email with instructions on how to access your eBook.

A confirmation email has been sent to **yuanyuanxie1018@163.com**.

[Download an itemized receipt \(PDF\)](#).

Have questions? Don't hesitate to [contact us](#) at any point throughout your preparation.

You Have 148 Days Until Your Exam

All your candidate resources will be available online within 24 hours. You'll also be able to access the curriculum eBook, your personal study planner, and topic-based practice tests through the mobile study app for *Android* or *Apple* devices.