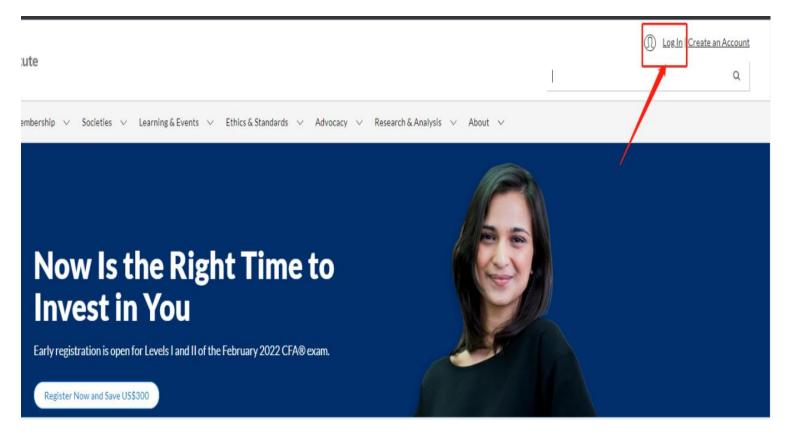
# 报考流程

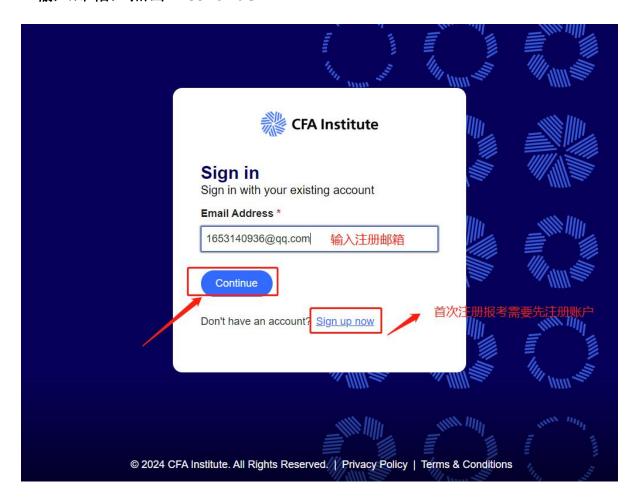
### Cfa 报考网址:

 $https://www.cfainstitute.org/en/programs/cfa/register?s\_cid=smo-cfa-APAC-cn-mar24-X-X-b2c-X-we chat-conversion-stu\_oth-all-x-GD$ 

### 1.点击"Log In"去登陆账户



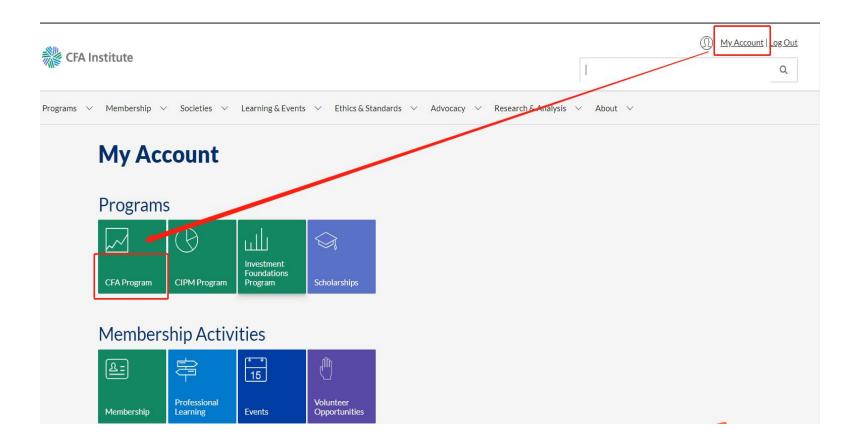
# 2.输入邮箱,点击"Continue"



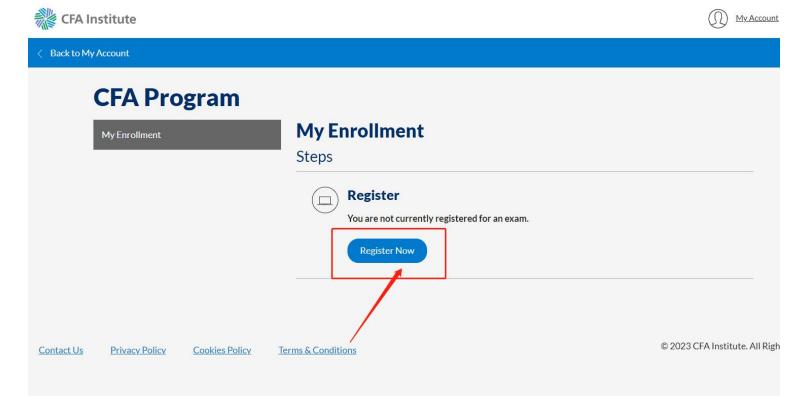
# **3.**输入密码,点击"Sign in"



# 4.登录 CFA 账户,在"My Account"里选择"CFA Program"



# 5. 点击"Register Now"注册



6.下面以报考 2024 年 11 月份一级的考试为例,需要报考哪个考季的考试看清楚后点击相应 考季的 "Register"

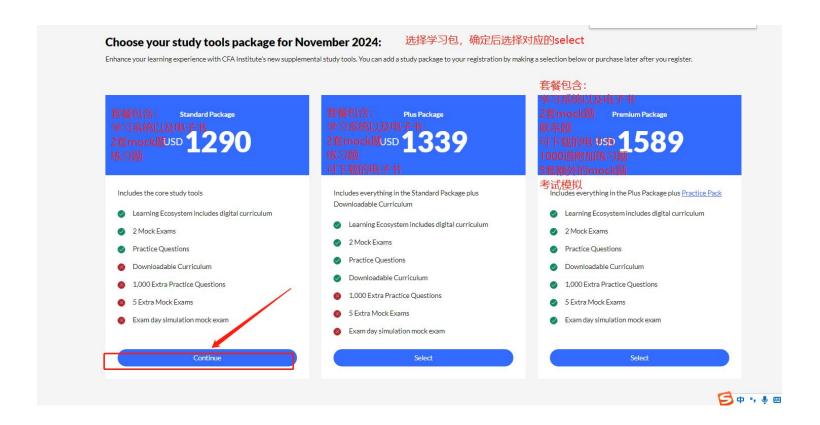
stitute **CFA Program Registration** Register Checkout We are glad you made the decision to register for the CFA Program exam. Payment via invoice: available up to 40 days before the close of registration. Please refer to the exam calendar for more details on the deadline. **CFA Program Registration** CFA Program Registration Level I - August 2024 Level I - November 2024 Prices include the digital curriculum and core study tools. Prices include the digital curriculum and core study tools. Registration USD 1250.00 Registration USD 1250.00 Closes 15 May 2024 Closes 07 August 2024 One-time Enrollment Fee USD 350.00 Early Registration Discount - USD 310.00 Ends 16 April 2024 USD 1600.00 One-time Enrollment Fee USD 350.00 USD 1290.00 Register Continue

edin com etininit

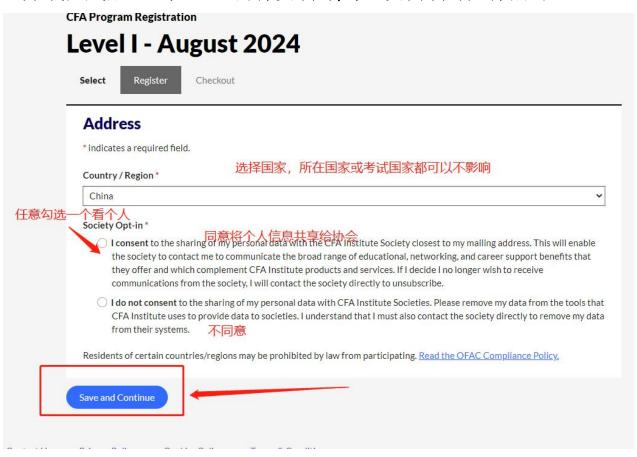
rms & Conditions

© 2024 CFA In:

### 7.选择学习工具包,根据自己经济和需求确定学习包后点击"select"。

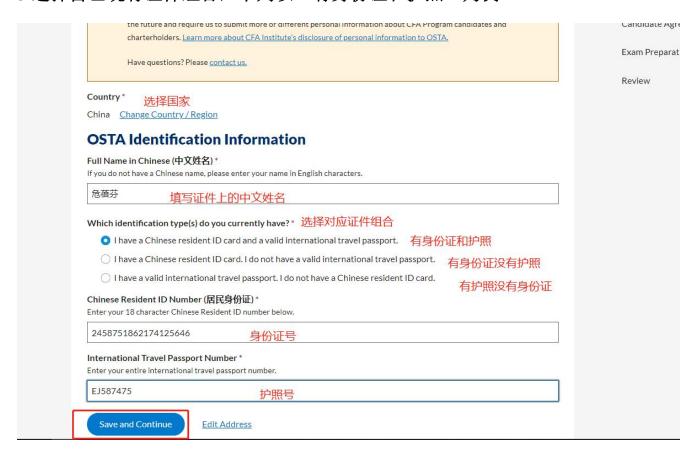


8.填写报名信息,带"\*"的都要填写,每一页面填写后都点击"Save and Contitue"进



Address	Step 1 of 9
* indicates a required field.	Address
Country/Region* China <u>Change Country/Region</u> 选择地区或者国家 Residents of certain countries/regions may be prohibited by law from participating, Read the OFAC Compliance Policy.	International Travel Passport  Entrance Requirements
Business / Building Name	Professional Information  Professional Conduct Inquiry
ddress Line 1* 有效地址,家庭住址或者目前住的地方都可以,限制30个字符,超过字符在下一栏填写	Personal Data Consent  Candidate Agreement
	Exam Preparation Providers
City*	Review
城市	
Province / Municipality *	
Select Province / Municipality 地区或者省市	
Postal Code *	
邮编	

### 9.选择自己现有证件组合,下列以"有身份证和护照"为例



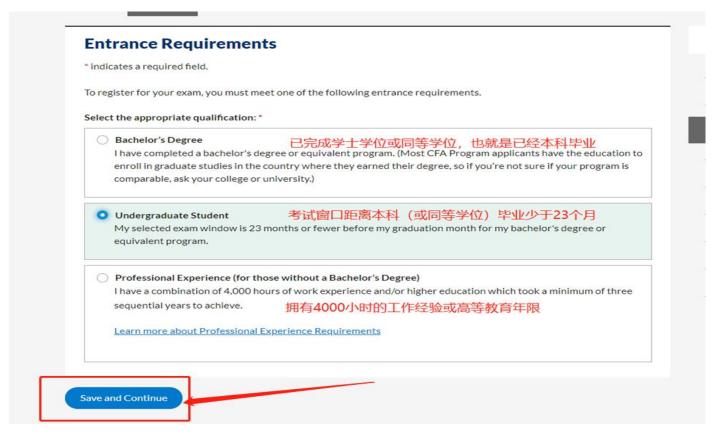
oberoser boy co-	名的拼音, 大小写不影响	
urname as Appears on Your Ide ist name	ntification *	
wei	姓的拼音	
ıffix		
Select Suffix 🗸		
ate of Birth*		
ate of Birth* 出生日期 <sub>м</sub>	onth Year	
05	March ✓ 1996	
ender* 性别		
• Female  Male  Pro	fer Not To Answer	
rimary Phone *	Lot Carl deal	
ountry / Region Code *	Phone Number *	
China +86	<b>→</b> 15021 <b>手机号</b>	
	150210 3 7 7 5	

Save and Continu

Exam

Revie

10 选择对应符合的学历要求,下列以"学生在读最后一年为准"。选择前两个需要填 学校名称和毕业时间,最后一个需要填写工作信息



# Level I - November 2024

Select

Register

Checkout

这个页面必须原英文网页填写,不能网页翻译

### **Entrance Requirements**

\* indicates a required field.

Qualification \*

Undergraduate Student Change Qualification

Please indicate where and when you expect to complete your degree. CFA Institute reserves the right to confirm this information with your university.

University Name \*

100 character maximum

sanlian

填写本科在读院校

Estimated Month / Year of Completion \*

06/2024

预计本科毕业时间

Save and Continue



# Level I - February 2024

Select

Register

Checkout

# Professional Information \* indicates a required field. Which best describes your current employment status? \* Employed 在职 Self-employed 自由职业 Student 学生 Unemployed 无业 Retired 退休

# Level I - February 2024

Select



Checkout

### **Professional Information**

\* indicates a required field.

**Current Employment Status\*** 

Student Change Current Employment Status

University Name\*

100 character maximum

目前在读学校名称

Estimated Month and Year of Completion\*

mm/yyyy

预计毕业时间

15

Save and Continue

# 11.职业道德问题必须选择"no",非首次有 10 个道德问题,也都是 no

	fessional Conduct Inquiry 所有问题全部选择"No "tes a required field.					
1	Suspension					
	Are you currently in within the last 5 years have you been, temporarily suspended by a regulatory organization or judicial court from participation; the financial services markets or from association with a financial services institution?					
	Ys fram currently or have recently been temporarily suspended.  No.					
2	Expulsion					
	Are you currently, or within the last 5 years have you been, permanently or indefinitely barred or expelled by a regulatory organization or					
	judicial court from participation in the financial services markets or association with a financial services institution?*					
	<ul> <li>Yes, I am currently or have recently been permanently or indefinitely barred or expelled.</li> </ul>					
	○ No.					
3	Trading Prohibitions and Restriction					
	In the last 5 years, have you been denied trading privileges on a securities or contract market, been denied registration under a law or					
	regulation, or prohibited from acting as an affiliated person or employee of a financial services institution?*					
	Yes, I have recently been denied trading privileges, registration, or affiliation.					
	res, mave recently been defined trading privileges, registration, or anniation.					

# 8 Assisting in a Violation

In the last 5 years, has a regulatory organization or judicial court found your conduct caused another person or financial services institution to violate a securities or commodities-related law, rule or regulation?  $^{\ast}$ 

- Yes, I was recently found to have caused another person to violate a securities or commodities-related regulation.
- O No.

# 9 Caused Suspension or Expulsion

In the last 5 years, has a regulatory organization or judicial court found that your conduct caused another person or financial services institution to be temporarily suspended, or indefinitely or permanently barred or expelled, from participation in the financial services markets or association with a financial services institution?\*

- Yes, I was recently found to have caused another person or institution to be temporarily or permanently suspended or expelled.
- O No.

Save and Continue

### Level I - November 2024

Select

Save and Continue

Register

Checkout

CFA® Program Registration

Candidate Privacy Notice

#### **Summary of Key Points**

- Personal Information provided to CFA Institute may be transferred to the United States or other jurisdictions that may not provide the same level of data protection as your own country.
- CFA Institute's test center service providers may employ video surveillance and audio recordings at the test centers.
- . Personal Information and Test Security Data will be transmitted and maintained securely.

As part of the registration and examination process, candidates must provide Personal Information to CFA Institute (915 E. High Street, Charlottesville, Virginia 22902 USA) for the purpose of administering the examination. CFA Institute collects, processes and maintains Personal Information in accordance with its <u>Privacy Policy</u>, which is also incorporated in the Candidate Agreement.

Your Personal Information may be transferred to the United States or other jurisdictions that may not provide the same level of data protection as your own country. Your Personal Information will be shared with CFA Societies and may also be transferred to certain third-party service providers of CFA Institute and CFA Institutes offices in various jurisdictions in order to provide services related to the exam. We provide appropriate protections for cross-border transfers as required by law for international data transfers. With respect to transfers originating from the European Economic Area ("EEA"), we implement standard contractual clauses approved by the European Commission, and other appropriate solutions to address cross-border transfers as required by applicable law.

The examination will be delivered at computer-based testing centers operated by CFA Institute test service providers Prometric and British Council. The testing center may deploy Digital Video Recording (DVR or CCTV) within the interior of the test center to monitor the test environment. Where allowed by law, this includes audio recordings within the reception/locker, proctor/security check-in and test law areas. This recording is necessary to protect the security of the proprietary test content, the integrity of the test delivery experience, to deter fraud and cheating, to protect against theft and pilferage, and for the security of staff and test center property. Video and audio recordings of your exam may be viewed by CFA Institute personnel only and as necessary for the purposes described. Access to the recorded material will be strictly limited to authorized personnel and retained for a limited duration as allowed by local applicable law. By registering for and sitting for an examination you are consenting to being recorded during the examination process.

CFA Institute maintains and requires its third-party processors such as Prometric to maintain reasonable and appropriate technical, physical, and administrative measures to protect the security of your Personal Information.
 Where permitted by applicable law, you may request access and the opportunity to modify our personal information by contacting CFA Institute as described in the "Your Rights' section at the end of the CFA Institute Privacy Policy. By proceeding to register for an exam today, you acknowledge your receipt and understanding of this Privacy Notice, and the acceptance of the CFA Institute Privacy Policy.

# Sack to top \* indicates a required field. Candidate Agreement \* Accept

### **Candidate Agreement**

\* indicates a required field.

This agreement applies to all candidates who register for the February 2022 exam.

Collapse All

Expand All

This CFA Program Candidate Agreement ("Candidate Agreement") is entered into between CFA Institute, whose registered address is 915 East High Street, Charlottesville Virginia 22902, USA, and the person who registers to the CFA Program Exam (as described below) ("you").

This Candidate Agreement applies to the CFA Program exams which are scheduled for February through November 2022, subject to deferral to subsequent exam administrations if any of the circumstances set out in clause 10 below applies ("CFA Program Exam"). The registration and selection of any exam appointment in February through November 2022 is only available subject to and conditional upon your agreement that it will be deferred to a rescheduled exam if any such circumstances arise. Each candidate should therefore be aware that any exam appointment in February through November 2022 that they select may be deferred to another date in the year 2022 or 2023 in any such circumstances. Such deferral will not entitle the candidate to cancel their registration or defer the exam to a date in a different month or year unless CFA Institute agrees otherwise in writing.



Contact Us Privacy Policy Cookies Policy Terms & Conditions © 2024 CFA Institute. All Rig

Exam Preparation Providers 是否允许把自己的信息分享给别的机构,跟会不会收到CFA有关考试信息的邮件没有关系 \*indicates a required field.

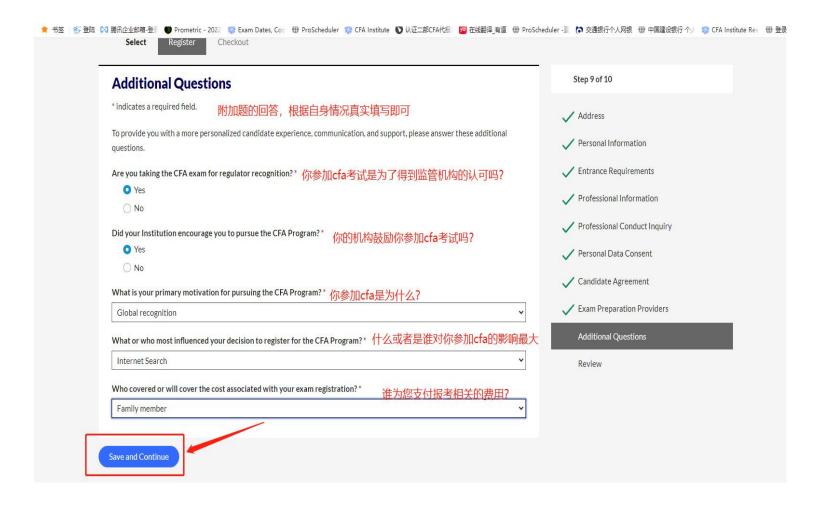
一般都选择"No"
The majority of CFA Program candidates use notes or courses from CFA Institute member societies or other organizations to help them prepare. Learn more about the Approved Prep Provider (APP) Program.

Would you like to receive information about additional exam preparation opportunities?\*

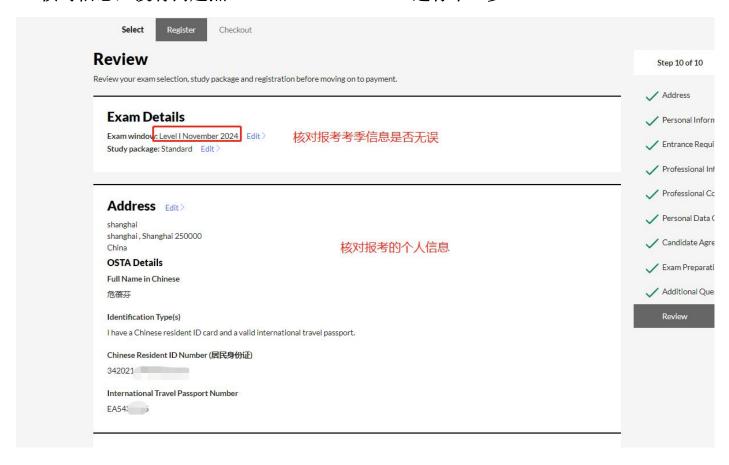
 Yes. I consent to receiving emails and other electronic communications from my local CFA Institute member society about additional approved exam preparation opportunities. I understand that I can withdraw this consent at any time by updating my communication preferences in my CFA Institute account. CFA Institute can share my contact information with my local CFA Institute member society and other oviders that participate in the Approved Prep Provider (APP) program.



Save and Continue



# 12.核对信息,没有问题点"Proceed to Pament"进行下一步



### Personal Information Edit

Please enter your name exactly as it appears on your international travel passport in English. If your name does not exactly match your international travel passport, you will be denied entry at the test center on exam day.

Full Name as Appears on Your Identification

**BEIFEN WEI** 

Suffix

Date Of Birth

05 January 1996

Gender

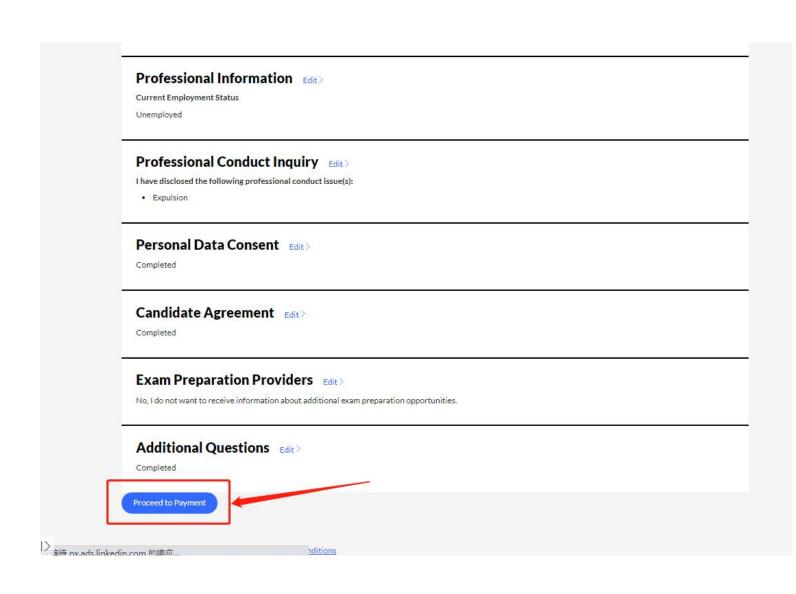
Female

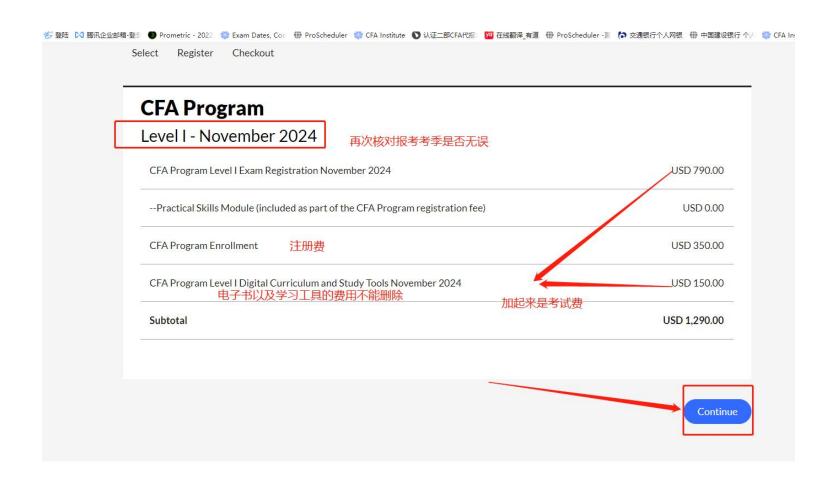
Contact Information

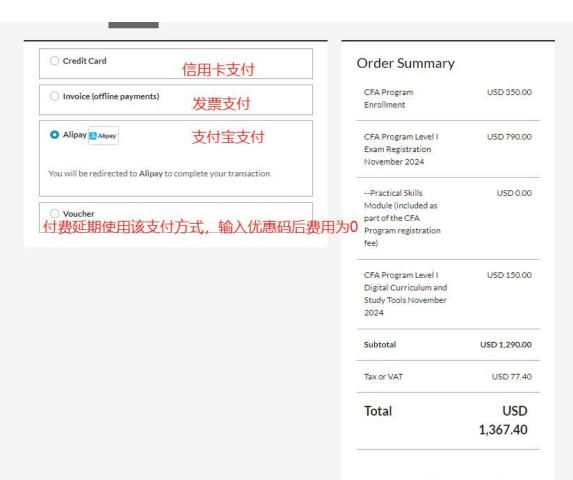
CHN +86 1502 2743

Name of the Country / Region That Issued Your Passport

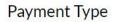
China







Back





### **Order Summary**

CFA Program Enrollment

USD 350.00

CFA Program Level I

Exam Registration

USD 790.00

November 2024

-- Practical Skills

USD 0.00

Module (included as part of the CFA Program registration

CFA Program Level I

USD 150.00

Digital Curriculum and Study Tools November

2024

Subtotal

USD 1,290.00

Tax or VAT

USD 77.40

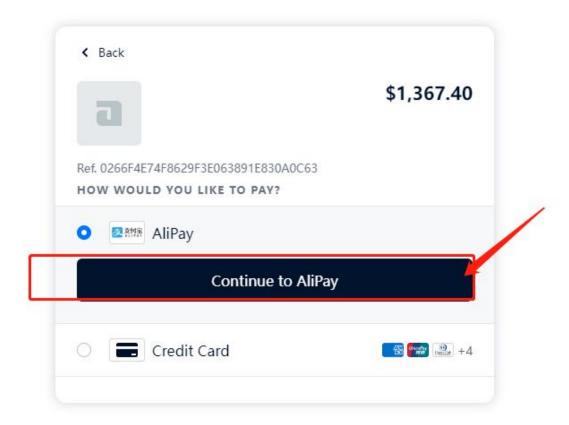
Total

USD

1,367.40

Continue to External Payment

Back





正在使用即时到账交易[?] 交易将在11小时59分钟后关闭,请及时付款!

汇率: 1.00 USD = 7.26294000 CNY [?]

1367.40 USD | 9931.34 CNY

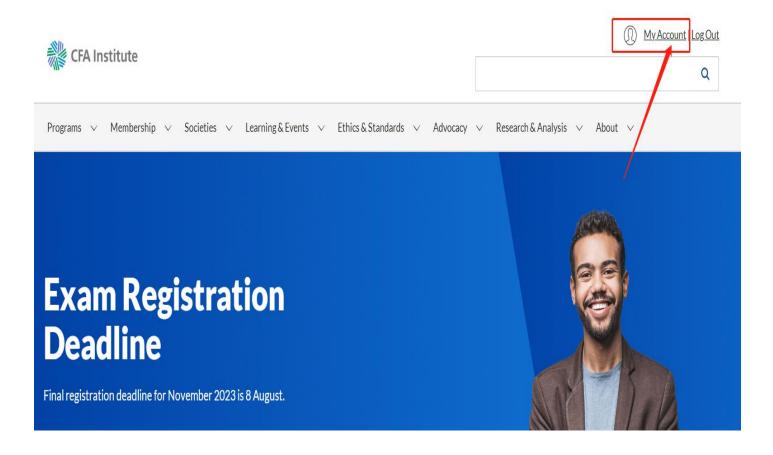


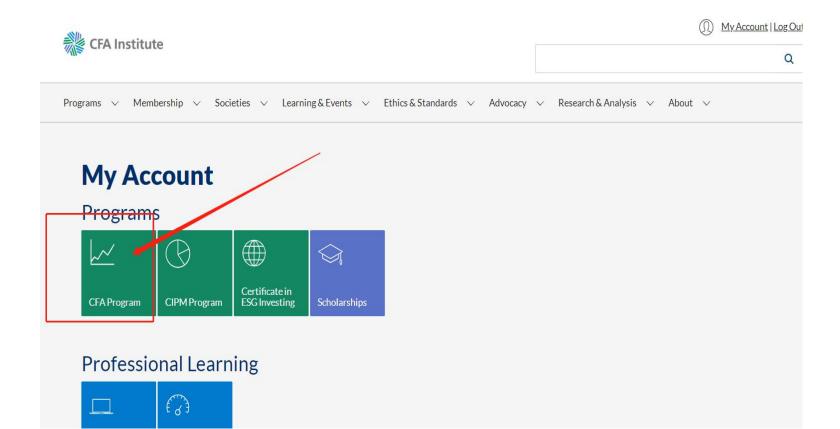


Ps: 缴费完成务必约考,下面是约考流程

# 约考流程

登陆您的 cfa 账号,点击右上角的"My account",按图操作去选择自己想要的考位





### My Enrollment

# Steps



# CFA® Program Level I August 2024 - Registered



### **Schedule Your Exam**

\* indicates a required field

输入国家后会自动跳出对应国家直接选中即可

### Exam Location \*

Enter the country/region where you would like to sit for your exam:

china

China (Mainland)

Schedule Your Exam



### **Complete Practical Skills Module Requirement**

You must complete at least one Practical Skills Module to receive your exam result.

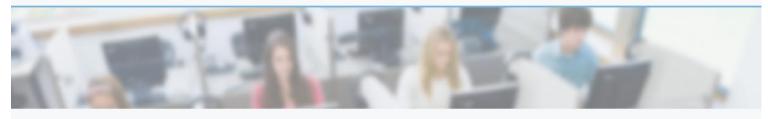


Steps ıles CFA® Program Level I August 2024 - Registered **Schedule Your Exam** \* indicates a required field ders **Exam Location \*** Enter the country/region where you would like to sit for your exam: China (Mainland) Schedule Your Exam **Complete Practical Skills Module Requirement** 

You must complete at least one Practical Skills Module to receive your exam result.



Language English









### 这个页面不要做任何点击选择会自动跳转的





Contact Us

**Privacy Policy** 

Terms & Conditions

©2023 CFA Institute. All Rights Reserved.



## Schedule Appointment

### What to Have on Exam Day

There are two critical things to have with you on exam day:

- 1. You must have an original and valid, international travel passport to sit for your exam. For more information, read the CFA Program Identification Policy.
- 2. The only two authorized calculator models are:
- o Texas Instruments BA II plus (Including BA II Plus Professional); and
- o Hewlett Packard 12C (including the HP 12C Platinum 25<sup>th</sup> anniversary edition, 12C 30<sup>th</sup> anniversary edition and HP 12C Prestige)

All other personal items must be kept in the personal belongings area, so please limit what is brought to the test center.

Test Sponso CFA Institute

Program Na CFA Program

Exam Name CFA Level II



# Schedule Appointment

### **Find a Test Center**

Enter your preferred location and date range to find a test center. Until your appointment is scheduled, availability is subject to change.

The location and date range can be updated on the next page if the available dates and times returned are not suitable to your schedule.

Scheduling For: CFA Level II

### Address

Chengdu, China 填写约考城市

Start Date

2023/11/18

**End Date** 

2023/11/22

**Note:** You must select an end date that is within 2 weeks of the selected start date.





Test

CFA I

Prog

**CFA** 

Eligil

SO28

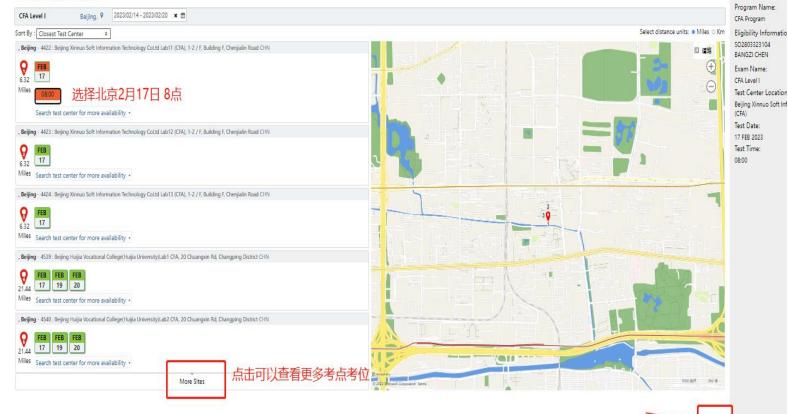
Woxi

Exan

CFA I

Contact Us Privacy Policy Terms & Conditions ©2023 CFA Institute. Al

### Schedule Appointment



Test Sponsor:

CFA Institute

3

所有信息无误后点击 Complete Appointment



#### **Appointment Verification**

• You must verify the information below and click 'Complete Appointment' to complete your transaction.



□ Send me an SMS/Text message reminder for this appointment (Text messaging fee may apply)

Prometric has a firm commitment to protecting your privacy. We will not disclose, to third parties, any specific personal identifying information about you without your permission.

By clicking the "Complete Appointment" button below, you agree to all terms and conditions related to payments, reschedules, cancellations, refunds and other policies set forth by your sponsoring organization.





