



CFA PROGRAM CANDIDATE CHECKLIST

PAPER-BASED EXAMS

Congratulations on choosing the CFA® Program! This checklist outlines some of the important steps you will need to take in preparation for your paper-based exam. Use it to keep track of the tasks to be completed before your exam day.

SEVERAL MONTHS PRIOR TO EXAM DAY

- Reviewed all [testing policies](#).**
- Confirmed valid international travel passport**—the only type of identification accepted. Confirmed that it does not expire before the exam date.
- Confirmed name in CFA Institute account matches name on international travel passport.**

DURING THE MONTH PRIOR TO EXAM DAY

- Printed exam admission ticket and compared to international travel passport.**
 - The last four digits of passport number, the name, and the expiration date on the passport must exactly match the information on the admission ticket.
 - If the name on your ticket does not match the name on your international travel passport exactly, you must change the name in your CFA Institute account, confirm, and then reprint your ticket.
- Checked for special instructions regarding my test center (e.g., travel or parking information).**
- Planned the best travel route to the test center on exam day.**
- Reviewed the [Rules of Procedure \(PDF\)](#).**
- Reviewed [COVID procedures for exam day](#).**

DURING THE WEEK PRIOR TO EXAM DAY

- Selected layered clothing for exam day.**
- Planned your lunch on exam day.** Pack a lunch or locate the nearest restaurant. Lunch and snacks will be allowed in the exam room.
- Reviewed [how to properly fill out answer sheets](#) during the exam.**
- Reviewed the [Typical Exam Day Schedule](#).**
- Reviewed [COVID procedures for exam day](#).**

ITEMS TO BRING ON EXAM DAY

Complete List

- Item that must be kept on my desk:** Exam admission ticket
- Items that may be kept on my desk:**
 - Approved writing instruments, which include [No. 2 or HB pencils](#)
 - Manual pencil sharpeners (no knives)
 - Erasers, with no paper holder or cover
 - Approved calculator. Only two calculator models are authorized for use during CFA Program exams:
 - Texas Instruments BA II Plus (including BA II Plus Professional)
 - Hewlett Packard 12C (including the HP 12C Platinum, 12C Platinum 25th anniversary edition, 12C 30th anniversary edition, and HP 12C Prestige)
 - Loose calculator batteries (no packaging) and screwdriver for battery replacement
 - Calculator cases and keystroke cards
 - Eyeglasses (but not eyeglasses case); eyeglass cleaning cloths
 - Ear plugs
 - Wristwatches (analog and digital) with alarms and timers silenced; all smart watches are prohibited.
 - Medicine, tissues, and other necessary medical or personal items
 - Gum, hard candy (boiled sweets), cough drops
- Items that must be kept on the floor when not in use:**
 - Water bottle.
 - Personal cleaning/sanitizing supplies
 - Extra face coverings
- Items that must be kept on the floor and NOT accessed at any time during the timed portion of the exam:**
 - Small bag for transporting personal belongings (must fit under your chair)
 - Valid International travel passport
 - Mobile phones and other electronic devices. All devices must be powered OFF
 - Wallet (money purse)
 - Packed lunch
- The following items are not permitted:**
 - Study materials, including notes, papers, textbooks, or study guides
 - Scratch paper, present/future value tables, or calculator manuals
 - Highlighters, correction fluid, correction tape, or rulers
 - Weapons of any kind
 - Smart watches, fitness trackers, remote communication, and photographic devices
 - Any type of desk clock or timer