



Candidate Membership Application

Criteria:

To be considered for Candidate Membership in the CFA Society Kansas City, you must be enrolled in the CFA Program, registered to take Level I, II or III of the exam in the next twelve months and have an active candidate number.

- agree to be bound by the CFA Institute *Code of Ethics and Standards of Professional Conduct*.

CFA Institute membership is not required to be a Candidate Member of the CFA Society Kansas City. An individual may be a Student or Candidate member of the CFA Society Kansas City for a combined maximum of three years.

Application:

Applicants are required to submit the following documents and payment in order to be considered for candidate membership:

- completed Candidate Membership Application, signed by a member of the CFA Society Kansas City.
- 200-500 word essay on importance of ethics in the conduct of business in the global economy
- \$25 annual membership dues (credit card or check payable to CFA Society Kansas City). Dues are not pro-rated.

Section A. How did you hear about the CFA Society Kansas City Candidate Membership?

- CFA Society Kansas City website
- CFA Member
- Mock Exam
- Post Exam Party
- Other _____

Section B. CFA Member Recommendation:

I, _____, a member of the CFA Society Kansas City hereby recommend this candidate, _____, for membership in CFA Society Kansas City.

Signature

Date

Section E. Payment:

Note: if your application is not accepted, your dues will be refunded.

I have enclosed a check in the amount of \$25 made payable to CFA Society Kansas City. (Note: dates on checks must be written in the following format: month/day/year)

I authorize CFA Society Kansas City to charge my credit card in the amount of \$25.

Card Type _____

Name as it appears on Credit Card _____

Credit Card Number _____

Expiration Date _____

Billing Address _____

City _____ State _____ Zip _____

Signature of cardholder _____

Section F. Applicant Statement:

I, _____, hereby affirm that I meet the criteria for candidate membership and I have attached a copy of my current unofficial transcript or class schedule.

I assert that the typed essay included with this application is my own original work.

I understand that Regular and Affiliate members of the CFA Society Kansas City must act with integrity, competence, diligence, respect, and in an ethical manner with the public, clients, prospective clients, employers, employees, colleagues in the investment profession, and other participants in the global capital markets. I understand that CFA Society Kansas City expects me, as a Candidate Member, to follow these same guidelines in my academic and professional life.

I agree to comply with all the applicable rules, bylaws and dues assessments.

Signature

Date

Completed application should be sent to:

CFA Society Kansas City
P.O. Box 26285
Overland Park, KS 66225

fax: 714-312-5856

email: cfasocietykc@gmail.com

Call or email with any questions, 800-410-5408