



GUIDE FOR COMPLETING CFA SOCIETY CLEVELAND LOCAL MEMBERSHIP APPLICATION

Thank you for your interest in joining CFA Society Cleveland. This packet contains all the paperwork necessary for Local Society Membership.

CFA Society Cleveland accepts applications on an annual basis. CFA Society Cleveland's membership year runs on a 12-month cycle beginning the most recent July 1st and ending the 30th of the following June. Dues are \$150 for non-candidates and \$125 for candidates annually and are not prorated. Student (non-voting) Memberships are also available and dues are \$100 annually. Membership is granted provisionally the day the completed application is received and officially activated the day the application is processed by CFA Society Cleveland's Board.

PLEASE READ ALL DIRECTIONS CAREFULLY

1. You may submit your application packet via mail, or email and pay the required dues fee via check or credit card (Visa, MasterCard, or Discover). Before submitting, make a copy of your completed paperwork for your records. Your application will not be processed unless complete.

Please make sure that you enclose the following to avoid delays in the application process:

CFA Society Cleveland Membership Application
CFA Society Cleveland Professional Conduct Statement
Payment

Send the completed and signed forms with payment (check or credit card information) for dues and fees to:

**Attention: Membership
CFA Society Cleveland
24199 Lyman Blvd.
Shaker Heights, Ohio 44122**

Or email to cfa@cleveland.cfasociety.org

2. You must have two professional references listed on your application: one of those references must be a supervisor or manager and the other must be a CFA Charterholder. We may contact your references to validate your business relationship and ethics.
3. CFA Society Cleveland processes Local Society Membership applications on a monthly basis. Once approved, you will receive a welcome email notifying you of acceptance.
4. CFA Society Cleveland's Professional Conduct Statement must be signed when joining and also when renewing.

NEED HELP?

If you have any questions concerning the application requirements or process, email cfa@cleveland.cfasociety.org or call 216-696-8066.