GUIDE FOR COMPLETING CFA SOCIETY CLEVELAND
STUDENT MEMBERSHIP APPLICATION

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

CFA Society Cleveland accepts applications on an annual basis. CFA Society Cleveland’s Student membership year runs on a 12-month cycle beginning the most recent August 1st and ending the 30th of the following July. Dues are $100 for students annually and are not prorated. 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, fax, 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
☐ 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 references listed on your application: one of those references must be a professor or academic advisor. We may contact your references to validate your relationship and ethics.

3. CFA Society Cleveland processes Student 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.