

Identification Information Change Request



Instructions

Print out the form and complete the four steps below. Sign the form, and e-mail the scanned form, or mail or fax it, with any necessary supporting documentation, to CFA Institute as noted at the bottom of this page. Please print legibly.

Important Notes

When submitting your Identification Information Change Request form, supporting documentation from a governmental agency is required. Please include a copy of one of the following:

- Marriage Certificate
- Divorce Decree (If you submit divorce papers, please do not include any decree provisions other than that ordering the name change.)
- Court-Issued Name Change Document
- Passport
- Driver's License

We regret that we cannot maintain non-English characters in our database. If your name includes a non-English character (for example, ö, œ, æ, é), provide an English letter, or combination of letters, that is acceptable to you.

CFA Candidates: The name on your exam admission ticket from CFA Institute must match your name as it appears on the government-issued photo identification that you use on exam day.

CIPM Candidates: The pre-printed name on each ID must match the name on file with CFA Institute and Pearson VUE. If your name does not match, please note that you will not be allowed to take the exam.

CFA Charterholders and CIPM Certificate Recipients: Please note that your legal name, which appears on your passport or other government-issued identification, is the name that will be printed on the CFA charter and the CIPM certificate. Any questions regarding the printing and distribution of the CFA Charter or CIPM Certificate must be submitted in writing to CFA Institute at info@cfainstitute.org.

Complete all sections.

STEP 1

CFA INSTITUTE IDENTIFICATION #	E-MAIL
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STEP 2*

Print your name below as it currently appears on CFA Institute records. Refer to your online profile for validation at www.cfainstitute.org (CFA member and candidate login, or CIPM member and candidate login).

PREFIX (CHECK ONE) <input type="checkbox"/> MR. <input type="checkbox"/> MISS <input type="checkbox"/> MS. <input type="checkbox"/> MRS. <input type="checkbox"/> DR. <input type="checkbox"/> PROF. <input type="checkbox"/> REV. <input type="checkbox"/> HON.	FIRST (GIVEN) NAME	MIDDLE NAME OR INITIAL
	LAST NAME (SURNAME OR FAMILY NAME)	SUFFIX

*If you are using this form to change your name only, you do not need to enter your current name again in the "Previous Information" column below.

STEP 3

Update the information that you would like to change in the appropriate columns below, including the previous data and the new data, as indicated. Please place a ✓ in the "No Change" column if the information that is on file at CFA Institute is correct and does not need to be changed.

	PREVIOUS INFORMATION	NEW INFORMATION	NO CHANGE <input type="checkbox"/>
Prefix			<input type="checkbox"/>
First (given) Name			<input type="checkbox"/>
Middle Name or Initial			<input type="checkbox"/>
Last Name (family or surname)			<input type="checkbox"/>
Suffix			<input type="checkbox"/>
Date of Birth (month/day/year)			<input type="checkbox"/>

STEP 4

SIGNATURE	DATE (MONTH/DAY/YEAR)
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