

## Guidelines for Universities Incorporating the CFA<sup>®</sup> Program into the Curriculum

The CFA<sup>®</sup> and Chartered Financial Analyst<sup>®</sup> trademarks are owned by CFA Institute. At its website, CFA Institute publishes guidelines relating to the use of its marks by candidates, charterholders and other third parties. In addition, universities that incorporate all or part of the CFA<sup>®</sup> Program into their undergraduate or graduate program curriculum should refer to the following guidelines.

Universities must:

- Include the appropriate trademark symbols after the trademarks including, CFA<sup>®</sup> and Chartered Financial Analyst<sup>®</sup>.
- Make appropriate statements about CFA Institute as the grantor of the CFA designation.

Universities may:

- State that the curriculum is based on the Candidate Body of Knowledge (CBOK) from the CFA Program.
- Use a term such as “CFA<sup>®</sup> Track” or “CFA<sup>®</sup> Concentration” to describe a specialized course of study in a degree. The terms “CFA Program” or “CFA Degree” must not be used.
- Include a link to the CFA Institute web site ([www.cfainstitute.org](http://www.cfainstitute.org)). Please contact CFA Institute for permission to use any CFA Institute logos.

Universities must NOT:

- Incorporate the CFA or Chartered Financial Analyst trademarks into the name of the degree, school or learning center. For example:
  - Master of Science in Investment Management – Appropriate
  - Master of CFA Finance – Inappropriate
  - University of Charlottesville CFA Program [Institute, Center, etc.] – Inappropriate
- Use the CFA or Chartered Financial Analyst trademarks in names of specific courses or in the domain names of the university.
  - CFA Derivatives 101 – Inappropriate
  - CFAUniversity.com – Inappropriate
- Seek to register, enforce rights in or otherwise protect the CFA or Chartered Financial Analyst trademarks.
- State or imply that studying in a specific program will guarantee acceptance into or passage of the CFA Program.
- Use any CFA Institute logos, including the CFA – Chartered Financial Analyst Logo (words circling an oval). That specific design is reserved solely for the use of CFA charterholders on personal correspondence such as business cards and letterhead.

For additional guidance, contact Jeannie Anderson in the Office of General Counsel at 434-951-5470 or [jeannie.anderson@cfainstitute.org](mailto:jeannie.anderson@cfainstitute.org).