

# Pension Trustee Code of Conduct Compliance Notification Form

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Once a pension plan adopts the Pension Trustee Code of Conduct, it must complete and submit the form below. In addition, the form must be updated annually by 30 June with information as of the most recent 31 December, with the exception of contact information, which must be current as of the submission date.

CFA Institute gathers and protects information in accordance with our [Privacy Policy](#).

Fields marked with an asterisk (\*) are optional.

## Contact 1

Prefix

Given Name/First Name

Family Name/Last Name

Job Title

Email Address

Phone Number

## Contact 2

Prefix

Given Name/First Name

Family Name/Last Name

Job Title

Email Address

Phone Number



## Pension Plan Information

Pension Plan Name

Pension Plan website (include URL)

Can CFA Institute display your Pension Plan name on the website?

## Pension Plan Address

Country / Region

Business / Building

Address Line 1

Address Line 2

City

Province/State

Postal Code

## Pension Plan Assets

Indicate the Pension Plan Assets in  
**(\$ billions)** as of the most recent  
calendar year end\*