

CFA Institute Conference Attendance Terms and Conditions

A. Payment

Attendance space is limited. Payment is due at time of registration. Registration forms submitted without payment will be confirmed on a space-available basis when payment is received.

B. Cancellation and Substitutions

Cancellation fees will apply according to the schedule detailed on the conference webpage. No refunds will be issued for any cancellations received within 24 hours of program start. Substitutions from the same company are accepted with fee adjustment, if appropriate. Sharing of registrations is not permitted.

C. Refusing Registration

CFA Institute reserves the right to refuse registration to anyone for any reason. Consequences of inappropriate behavior are detailed below.

As a US corporation, CFA Institute must comply with The Department of the Treasury's Office of Foreign Asset Control ("OFAC") Sanctions programs. Read the full CFA Institute OFAC Compliance Policy [here](#).

D. Entry Requirements

Registration for a CFA Institute conference does not guarantee entry into the country where the conference will be held. Participants are responsible for obtaining any visa or entry documents needed.

E. Copyright of Materials and Recordings

Presentations and associated materials are copyright-protected and are, in the main, owned by CFA Institute or the individual Speaker. While Delegates are encouraged to use social media to share their insights and experiences at CFA Institute events, Delegates should link directly to content on the CFA Institute website, unless otherwise noted (framing is not permitted). Delegates may not distribute, display, or post online any recordings, transcriptions, and/or copies of sessions at CFA Institute events without the express prior written permission of CFA Institute or the copyright owner.

F. Permissions

Any person attending a CFA Institute conference, seminar, or other program grants permission to CFA Institute to use and publish his or her image or likeness collected in connection with the program, for any usual and customary purpose of CFA Institute, including advertisements for CFA Institute and its programs.

G. Liability

CFA Institute does not assume responsibility or liability for stolen, lost, or damaged personal property.

H. Privacy

The full CFA Institute Privacy Policy can be found [here](#).

CFA Institute Concern for Conference Safety

A. Engagement Conduct Information

1. Expectations

CFA Institute is dedicated to providing a safe, welcoming and professional conference experience for all participants (staff, sponsors, volunteers, speakers, attendees, and other guests, hereinafter referred as "Participants"). We expect all Participants to abide by this code of conduct at all Conference Events (which include, *inter alia*, sessions, business meetings, interviews, receptions and ancillary activities).

Expected behavior includes, but is not limited to:

- be considerate, respectful, and collaborative.
- be mindful of your surroundings and of fellow Participants.
- alert conference organizers if you notice a dangerous situation or someone in distress.

2. Inappropriate Behavior

CFA Institute does not tolerate harassment and/or aggression / intimidation / hostile behavior which would interfere with Participants' experience. These behaviors are inappropriate and unacceptable.

These behaviors can be related to, but not limited to inappropriate actions or statements based on characteristics such as creed, race, color, sex, sexual orientation, national origin, marital status, disability, military status, domestic violence victim status, predisposing genetic characteristics or any other category protected by any applicable regulations.

If you are subjected to unacceptable behavior, notice that someone else is being subjected to unacceptable behavior, or have any other concerns, please notify CFA Institute Conference & Event Staff or venue staff or report the concern using the Ethics Helpline +1 844 283 9319 or the Ethics Helpline [web form](#) as soon as possible. Threats or other intimidation against a person who has made a complaint or provided information in support of complaint will not be tolerated and will be sanctioned accordingly.

3. Consequences of Inappropriate Behavior

If a Participant engages in unacceptable behavior, Participant may be asked to stop behaving inappropriately and should comply immediately.

CFA Institute may take any action it deems appropriate, including expelling the offender from the event or business activity with no refund, prohibition from future events and business activities, reporting the behavior to Professional Conduct for further investigation, and/or pursuing legal action.

The full CFA Institute Engagement Conduct Policy can be found [here](#).

B. Safety & Security

1. CFA Institute Concern for Public Safety

We know how important safety is to our Participants. We share this interest in providing a respectful and safe environment conducive to discussion and networking. To this end, please note that CFA Institute partners with trained security and safety providers.

CFA Institute selects conference sites deemed reasonably safe for all Participants after assessing : i) physical security at the event venue; ii) transport to and from the venue; iii) political and security environments of the event city; iv) the event facility and personnel; v) and the emergency response and evacuation procedures offered by the venue and local authorities. All these items are reviewed and continuously evaluated and monitored prior to and during any conference. However, circumstances can change rapidly and without warning at any time. Although CFA Institute makes every effort to address security at our events, we do not guarantee physical security at our events. Attendees attend our events at their own risk.

A CFA Institute Incident Coordinator will be onsite at all times to ensure close coordination between our intelligence sources and onsite venue security to maintain smooth and efficient communications in accordance with our safety procedures.

2. In Case of Emergency:

If you or someone you are with is experiencing a life-threatening situation, call 999 or your local emergency services number.

For other emergencies and incidents, please approach a member of venue staff, who are easily identifiable by their uniforms. Additionally, CFA Institute Conference & Event Staff will be happy to help participants contact venue security or local law enforcement, provide escorts, or otherwise assist. Providing for your safety and comfort is our priority.

3. Tips for Staying Safe:

- In the event of an emergency, follow the instructions of all security and emergency personnel as well as secondary information sent from CFA Institute via email or SMS.
- Wear your name badge to all events;
- Inform a member of venue security and staff should you see anything suspicious.
- Know your closest emergency exit when you are in a meeting room or event venue.