

Approved Prep Provider Program Application Package

Approved Prep Provider Program

Email: prepproviders@cfainstitute.orgWeb: <http://www.cfainstitute.org/utility/examprep/Pages/index.aspx>

Section I: Provider Data

Provider Company Name^

Provider Street Address^

Provider City^

State **or** Province^

Country^

Postal Code^

Contact Name^

Contact Email^

Contact Phone^

Provider Website Address (URL for listing on our website)^

Check only one:

☐

New applicant

☐

Previous Program participant

Section II: Products/Services Offered

All products and services offered by the provider for exam preparation *must* be submitted for inclusion in the APP Program. Products and services offered for different programs and different exam levels within a single certificate program are considered separate products. Complete the following charts for all courses and all materials.

A. Review Courses: Please complete the chart for each live course offered. Provider must provide an Instructor Biography Form for the director of Provider's program, and for each instructor (if a Provider has more than five instructors, provide biographies for only the five most senior instructors).

CFA Institute program name	List name(s) of ALL <u>Live Courses</u> offered for each program below	Are your courses offered live, online, or both live and online?	List regions where you offer live courses for each program/level.	Does this course include LOS?	Estimated number of Candidates for each program	Number of Instructors for each program
CFA Program - Level I						
CFA Program - Level II						
CFA Program - Level III						
CIPM Program - Level I						
CIPM Program - Level II						
Investment Foundations Program						

B. Prep Materials: Please list the types of materials (study notes, study guides, sample questions, flashcards, etc.) offered for each course. Indicate whether the material is offered in print, online, or both. If the prep materials contain copyrighted materials that were licensed or provided by third parties (e.g., by another prep provider), please identify the third party that provided the license.

CFA Institute program name	List <u>all</u> materials you use (notes, class PowerPoints, study guides, flashcards, etc.)	List (regions, countries, cities, etc.) where materials are offered in Print	Are your materials offered online?	Does this product include reproduced LOS?	Is this material self-developed or third party developed? Identify third-party, if any.
CFA Program - Level I					
CFA Program - Level II					
CFA Program - Level III					
CIPM Program - Level I					
CIPM Program - Level II					
Investment Foundations Program					

Section III: Instructor Biography

(If provider has more than 5 instructors, provide biographies for only the five most senior instructors)

Instructor Name: _____

CFA Institute ID No.: _____

(Note: This field must be completed if the instructor ever registered for any CFA Institute program).

CFA Institute programs completed (check all that apply):

- | | |
|---|--|
| <input type="checkbox"/> CFA Program - Level I Passed | <input type="checkbox"/> CIPM Program - Level I Passed |
| <input type="checkbox"/> CFA Program - Level II Passed | <input type="checkbox"/> CIPM Program - Level II Passed |
| <input type="checkbox"/> CFA Program - Level III Passed | <input type="checkbox"/> CIPM Designation Holder |
| <input type="checkbox"/> CFA charterholder | |
| | <input type="checkbox"/> Investment Foundations Certificate Holder |

Educational background (e.g., colleges/universities attended, course of study, degrees obtained):

Teaching experience:

CFA Institute program courses taught (check all that apply):

- | | |
|--|---|
| <input type="checkbox"/> CFA Program - Level I | <input type="checkbox"/> CIPM Program - Level I |
| <input type="checkbox"/> CFA Program - Level II | <input type="checkbox"/> CIPM Program - Level II |
| <input type="checkbox"/> CFA Program - Level III | |
| | <input type="checkbox"/> Investment Foundations Program |

Other teaching experience:

Applicable work experience (e.g., employer, job title, core responsibilities, period of employment):

Section IV: Copyright Permissions Request

If you are using **any** CFA Institute material in your exam prep materials, please complete this section to request copyright permissions. You may select more than one option. After this section is completed, a permissions agreement will be generated (based on permissions requested) and sent to the provider for approval/signature before moving forward. If you have permission to use and are only using third-party material (not using any self-developed material) and have noted this in Section II (A and B) of this application there is no need to complete this section.

Type I: LOS Usage Information

Please list all products by level (check the level if you are repeating products for more than one level):

☐ CFA Program - Level I: _____

☐ CFA Program - Level II: _____

☐ CFA Program - Level III: _____

☐ CIPM Program - Level I: _____

☐ CIPM Program - Level II: _____

☐ Investment Foundations Program: _____

URL where material will be posted: _____

Is this website password protected? ☐ Yes ☐ No Approximate maximum number of users: _____

To whom will materials be distributed?

Other information that may be relevant:

Type II: Other Usage Information

The copyright fee (if applicable) will be determined upon request and included in the agreement.

Describe material being requested (Please specify the exact material(s) you are interested in, including the edition, year, level, volume, specific reading, specific table or exhibit, etc.):

☐ Photocopy Approximate maximum number of copies: _____

☐ Email via PDF attachment Approximate maximum number of recipients: _____

☐ Post on website Approximate maximum number of users: _____

URL where material will be posted: _____

Is this website password protected? ☐ Yes ☐ No

How many months would the material be posted (up to one year)? _____

☐ Reprint in a book (text, trade, other) Maximum print run: _____

Title of Work: _____

Projected Publication Date: _____

☐ CD/DVD-ROM Run Quantity: _____

☐ Flashcards Run Quantity: _____

☐ Other (please specify): _____

Price you plan to charge for materials: _____

To whom will materials be distributed? _____

Other information that may be relevant: _____

Section V: Product/Service Documentation

Applications must include documentation **and samples (sent via link, pdf, etc.)** for each self-developed live course and each self-developed prep material listed in Section II. For previous APP Program participants, materials need not be resubmitted for products and services that were previously approved.

All documents must be in English. If the documents are online, provide the URLs and any passwords required for viewing.

- ☐ I have attached/sent documentation for each new live course or new prep material offered.
- ☐ Documentation is being sent separately. (*Note: No applications will be processed prior to receipt of all required material*).

Section VI: References

CFA Institute will conduct reference checks for all first-time applicants and reserves the right to check reference information for current and/or renewing providers.

Section VII: Terms and Conditions

I represent and warrant that the information provided is true and correct, and that I have the legal authority to bind the provider identified below. Provider agrees to comply with all terms and conditions of the Approved Prep Provider Program.

AGREED: PROVIDER

(Provider Company Name)

By: _____
(Signature)

Name: _____
(Printed or Typed)

Title: _____

Date: _____

Please return this seven-page form to:
Approved Prep Provider Program
Email: prepproviders@cfainstitute.org