



# CFA PROGRAM CANDIDATE CHECKLIST

Congratulations on choosing the CFA® Program! This checklist outlines some of the important steps you will need to take in preparation for the exam. Use it to keep track of the tasks to be completed before your exam day.

## SEVERAL MONTHS PRIOR TO EXAM DAY

- Review all [testing policies](#).
- Confirm [valid international travel passport](#)—the only type of identification accepted. Confirm that it does not expire before the exam date.

## DURING THE MONTH PRIOR TO EXAM DAY

- Print [exam admission ticket](#) and compare to [international travel passport](#).
  - The last four digits of passport number, the name, and the expiration date on the passport must exactly match the information on the admission ticket.
  - If the name on your ticket does not match the name on your international travel passport exactly, you must change the name in your [CFA Institute account](#), confirm, and then reprint your ticket.
- Check for [special instructions](#) regarding my test center (e.g., [travel or parking information](#)).
- Plan the best travel route to the test center on exam day.
- Review the [Rules of Procedure \(PDF\)](#).

## DURING THE WEEK PRIOR TO EXAM DAY

- Select layered clothing for exam day.
- Plan where to eat lunch on exam day. Snacks and water are not allowed in the testing room.
- Review [how to properly fill out answer sheets](#) during the exam.
- Review the [Typical Exam Day Schedule](#).

## ITEMS TO BRING ON EXAM DAY

### [Complete List](#)

- Items that must be kept on my desk**
  - Exam admission ticket
  - Valid international travel passport
  - Approved calculator. Only two calculator models are authorized for use during CFA Program exams:
    - Texas Instruments BA II Plus (including BA II Plus Professional)
    - Hewlett Packard 12C (including the HP 12C Platinum, 12C Platinum 25th anniversary edition, 12C 30th anniversary edition, and HP 12C Prestige)
  - Approved writing instruments, which include [No. 2 or HB pencils](#)
- Optional items to store on my desk:**
  - Manual pencil sharpeners (no knives)
  - Erasers, with no paper holder or cover
  - Loose calculator batteries (no packaging) and screwdriver for battery replacement
  - Calculator case and keystroke card
  - Eyeglasses, but not the eyeglass case
  - Earplugs
  - Wristwatches (analog or digital) are allowed, but smart watches are prohibited
- Items allowed in testing room to keep in my pocket or under my chair when not in use:**
  - Wallet (money purse)
  - Medicine, tissues, and other necessary medical or personal items
  - Gum, hard candy, cough drops
  - Eyeglasses case
  - Keys