

Credentialing Programs Copyright Permissions Request Form

If you are requesting to use *any* CFA Institute credentialing program (CFA® Program, CIPM® Program, Certificate in ESG Investing™, and/or CFA Institute Investment Foundations™ Program) curriculum content, please complete this form to request copyright permissions. After this form is completed, a permissions agreement will be generated (based on permissions requested) and sent to you for approval/signature before moving forward. If any fees apply, you will be notified *before* the agreement is generated.

Step I: Contact information

Company or University Name^

Street Address^

_____/_____
City^ State or Province^

_____/_____
Country^ Postal Code^

_____/_____
Contact Name^ Contact Email^

_____/_____
Contact Phone^ Date^

Step II: Describe material being requested

Please specify the exact material(s) you are interested in, including the year, program, level, volume, specific reading(s), etc. Please use the *Example* for guidance on how to complete this section. **Incomplete forms will not be processed.**

CFA Institute program name	Enter one year per row	Enter one level per row	Enter one volume per row	Enter reading numbers requested	Enter name(s) of reading(s)
<i>Example:</i> CFA Program	2018	Level I	Volume 4	Readings 35 and 36	Capital Budgeting; Cost of Capital

Step III: Select desired use (exactly how you will be using the material requested):

Project in PowerPoint

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 will the material be posted (up to one year)? _____

Other (please specify):

Price you plan to charge for materials, if any:

To whom will materials be distributed?

Other information that may be relevant: