

Name/Identification Change Form

STOP!

Do you need to fill out this form?

CFA Program candidates can update their passport number, expiration date, and country of issuance online at www.cfainstitute.org/passportupdate if their passport **is expired or will expire** before the exam.

Use this form for all CFA Program, CIPM Program, and Member name changes or updates, date of birth updates, and gender updates, and for CFA candidates updating their passport information if the passport in the system **will not** expire before the exam day.

This form **will not** be processed without a copy of your valid international travel passport. In addition, all legal name changes must also submit one of the following:

- Marriage Certificate
- Divorce Decree (Do not include decree provisions other than that ordering the name change)
- Court-Issued Name Change Document

Complete all steps below. Submit completed forms and identification to cmservices@cfainstitute.org. Allow up to five (5) business days for processing. You will receive confirmation via email once the change has been completed.

STEP 1

Complete each section by typing into the editable form fields

CFA INSTITUTE IDENTIFICATION #

E-MAIL ADDRESS

STEP 2

Enter the information you need changed.

PREVIOUS INFORMATION (if available)

MR. MISS MS. MRS. DR. PROF. REV. HON.

PREFIX (CHECK ONE)

FIRST (GIVEN) NAME

MIDDLE NAME OR INITIAL

LAST NAME (SURNAME OR FAMILY NAME)

PASSPORT NUMBER (LAST 4 DIGITS ONLY) EXPIRATION DATE

PASSPORT COUNTRY OF ISSUANCE

DATE OF BIRTH

MALE FEMALE

GENDER

NEW INFORMATION

MR. MISS MS. MRS. DR. PROF. REV. HON.

PREFIX (CHECK ONE)

FIRST (GIVEN) NAME

MIDDLE NAME OR INITIAL

LAST NAME (SURNAME OR FAMILY NAME)

PASSPORT NUMBER (LAST 4 DIGITS ONLY) EXPIRATION DATE

PASSPORT COUNTRY OF ISSUANCE

DATE OF BIRTH

MALE FEMALE

GENDER

NO CHANGE

STEP 3

APPLICANT SIGNATURE

DATE (DAY/MONTH/YEAR)

Reminder: This form will not be processed without the appropriate documentation.

Submit this form via e-mail to cmservices@cfainstitute.org. Contact us with any questions at www.cfainstitute.org/contactus.