CFA Program Deferral Form

November 2026

For a Death in the Immediate Family*

*For the CFA Program Deferral policy, immediate family is defined as only the candidate's parent, sibling, spouse/domestic partner, or child.

Please complete this form and upload it with a copy of the death certificate. All documentation must be in English or be a notarized translation.

If approved, you will be emailed a link to submit your USD100 processing fee. You must pay this fee within 7 days of approval to receive your deferral.

TO BE COMPLETED BY CANDIDATE

CANDIDATE FULL NAME AS DISPLAYED IN CFA INSTITUTE RECORD

CFA INSTITUTE IDENTIFICATION #

EMAIL AS DISPLAYED IN CFA INSTITUTE RECORD

EXAM DATE

NAME OF DECEASED

RELATIONSHIP TO CANDIDATE

DATE OF DEATH (DAY/MONTH/YEAR)

By signing this form, I agree that I have provided truthful and accurate information regarding my deferral request. I understand that providing false and/or inaccurate information may be deemed as a violation by the CFA Institute Professional Conduct department, result in disciplinary sanction, and consequently impact future registrations.

CANDIDATE SIGNATURE

DATE (DAY/MONTH/YEAR)

Providing false documentation is a serious violation of the CFA Institute Code of Ethics and Standards of Professional Conduct. If we suspect your documentation is false, your request will be denied and you will be referred to our Professional Conduct department for disciplinary sanctions, including possible restriction from the CFA Program exams.

Upload this document and a copy the death certification at https://cfaprogram.cfainstitute.org/documents/upload within 7 days of your request. All documentation must be in English or be a certified English translation.