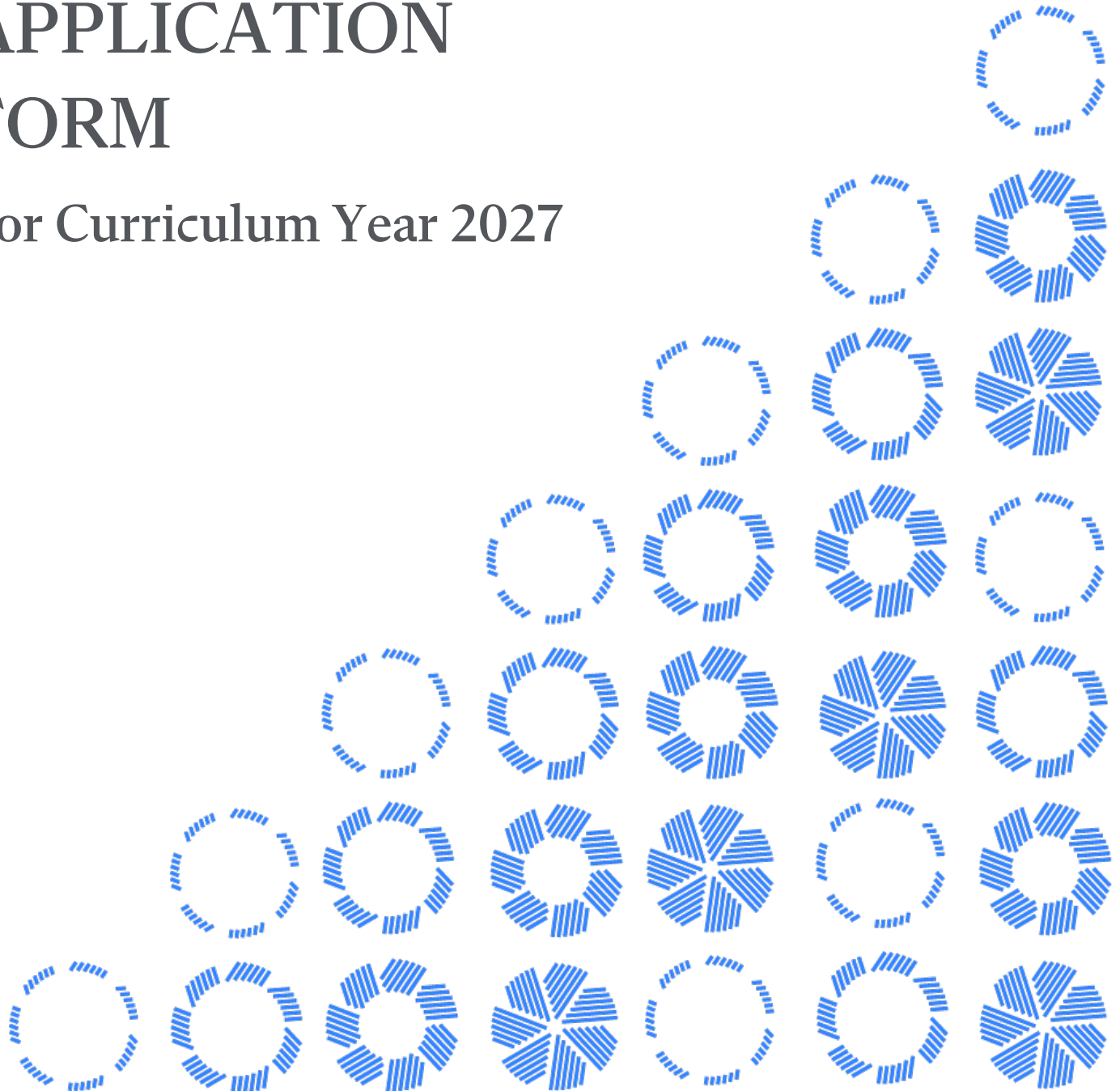




CFA Institute

CFA INSTITUTE PREP PROVIDER APPLICATION FORM

For Curriculum Year 2027



Name of Company	
Primary Business Address	
Names, email addresses and contact numbers for primary contacts	
Name and contact details for invoicing	
Number of candidates served by CFA Institute credentials and by level by calendar year, 2 years prior to the Curriculum Year you are applying for. Only include candidate who originally paid to sit in that year <i>e.g. if you are seeking 2027 curriculum year copyright, you should provide your 2025 calendar year total number of candidates served</i>	
Are you a reseller? If yes, who for?	
Do you provide hard copy materials to your customers? (Yes/No)	
In which language(s) do you provide your written materials?	
How many instructors deliver your prep services? (Please provide the professional biographies of all tutors and CFA ID numbers . Append a separate page or pages if necessary.)	
In which language(s) do you provide tuition, if at all?	
Please confirm that your prep materials cover substantially at least one level of one CFA credential (Yes/No)	
Did you update your prep materials in the latest cycle? (Yes/No for each of the CFA Institute credentials that you serve)	
How will your materials be packaged and offered by CFA Institute credential? Please list all product types and channels.	

<p>If you have a question bank, please list the approximate number of proprietary and unique questions as advertised to candidates? <i>Note that questions created by CFA Institute should not be counted in the total number of questions advertised.</i></p>	
<p>List the URL(s) where materials will be available.</p>	
<p>Will the materials be password protected or behind a login wall? Yes/No How will the materials be protected or otherwise restricted to only verified users?</p>	
<p>What price(s) will you charge for the product(s) which contain CFA Materials?</p>	
<p>List the top 5 countries by candidate volume in descending order by CFA Institute credential (including your own sales and sales by third party resellers, redistributors or partners).</p>	
<p>Provide an email address for each recipient that will need Learning EcoSystem access.</p>	
<p>For our website, please specify the name and URL you would like to see for your company</p>	
<p>For our website, please specify the region(s) you would like your company to appear when filtering by: AMER, APAC or EMEA (multiple regions possible). This shows where you mainly do business</p>	
<p>Date & signature</p>	