



## New Application Communications

Our audience for these emails are individuals since 2019 who have started – but not submitted – an application.

### Initial Member Email: Send on 1 June

**Subject Line:** Update to your membership application

Last year, our membership approved an amendment to the bylaws that changed the way we calculate work experience requirements for our new members.

Our members voted to adjust the work experience requirement from four years to an equivalent 4,000 hours, completed in a minimum of 36 months. By changing the unit of measurement for work experience, but not the amount of experience required, we aimed to promote greater inclusion of professionals who meet the high standards of membership and address shifts in the global investment management workforce—namely, an increase in flexible schedules, part-time professionals, and remote work arrangements.

Because you have saved (but not submitted) your application, we want to inform you that we will be updating our technical requirements to accommodate the new work experience standards. As a result, **your application will be unavailable for four to six weeks, beginning 1 July.**

**If you want your application to be evaluated by the current, four-year requirement (rather than by 4,000 hours), please submit your application by 30 June.**

#### **CTA Button: Access Application**

Otherwise, you will be able to reapply when the application reopens. Your application information, including references, will transfer, and you will be required to recalculate your work experience to reflect the new requirements.

Should you have any questions about your application, please contact us at [membership@cfainstitute.org](mailto:membership@cfainstitute.org). We look forward to reviewing your application.

Sincerely,

CFA Institute

## Reminder Message: Send on 15 June

**Subject line:** Reminder: Updates to your membership application

Last year, our members approved an amendment to the bylaws that changed the work experience requirement for regular membership from four years to an equivalent 4,000 hours, completed in a minimum of 36 months.

Because you have saved (but not submitted) your application, we want to remind you that we will be updating our technical requirements to accommodate the new work experience standards. As a result, **your application will be unavailable for four to six weeks, beginning 1 July.**

**If you want your application to be evaluated by the current, four-year requirement (rather than by 4,000 hours), please submit your application by 30 June.**

**CTA Button: Access Application**

Otherwise, you will be able to reapply when the application reopens. Your application information, including references, will transfer, and you will be required to recalculate your work experience to reflect the new requirements.

Should you have any questions about your application, please contact us at [membership@cfainstitute.org](mailto:membership@cfainstitute.org). We look forward to reviewing your application.

Sincerely,

CFA Institute

## Post-Reopening of Application

**Subject Line:** Complete your membership application

Our changes to the application process reflecting our updated work experience requirements have been made, and your application is now available.

We invite you to complete your application.

**CTA Button: Access Application**

Please note:

- We have migrated your information, including your references, to the new application. Please confirm that your information is still accurate.
- You must provide your work experience hours before you can submit your application.

Should you have any questions about your application, please contact us at [membership@cfainstitute.org](mailto:membership@cfainstitute.org). We look forward to reviewing your application.

Sincerely,

CFA Institute

## Mainland China Initial Member Email: Send on 1 June

**Subject Line:** Update to your CFA® charterholder application

Last year, our organization approved an amendment to the bylaws that changed the way we calculate work experience requirements for our new charterholders.

Our charterholders voted to adjust the work experience requirement from four years to an equivalent 4,000 hours, completed in a minimum of 36 months. By changing the unit of measurement for work experience, but not the amount of experience required, we aimed to promote greater inclusion of professionals who meet our organization's high standards and address shifts in the global investment management workforce—namely, an increase in flexible schedules, part-time professionals, and remote work arrangements.

Because you have saved (but not submitted) your application, we want to inform you that we will be updating our technical requirements to accommodate the new work experience standards. As a result, **your application will be unavailable for four to six weeks, beginning 1 July.**

**If you want your application to be evaluated by the current, four-year requirement (rather than by 4,000 hours), please submit your application by 30 June.**

**CTA Button: Access Application**

Otherwise, you will be able to reapply when the application reopens. Your application information, including references, will transfer, and you will be required to recalculate your work experience to reflect the new requirements.

Should you have any questions about your application, please contact us at [membership@cfainstitute.org](mailto:membership@cfainstitute.org). We look forward to reviewing your application.

Sincerely,

CFA Institute

## Mainland China Reminder Message: Send on 15 June

**Subject line:** Reminder: Updates to your CFA® charterholder application

Last year, our organization approved an amendment to the bylaws that changed the work experience requirement from four years to an equivalent 4,000 hours, completed in a minimum of 36 months.

Because you have saved (but not submitted) your application, we want to remind you that we will be updating our technical requirements to accommodate the new work experience standards. As a result, **your application will be unavailable for four to six weeks, beginning 1 July.**

**If you want your application to be evaluated by the current, four-year requirement (rather than by 4,000 hours), please submit your application by 30 June.**

### **CTA Button: Access Application**

Otherwise, you will be able to reapply when the application reopens. Your application information, including references, will transfer, and you will be required to recalculate your work experience to reflect the new requirements.

Should you have any questions about your application, please contact us at [membership@cfainstitute.org](mailto:membership@cfainstitute.org). We look forward to reviewing your application.

Sincerely,

CFA Institute

## Mainland China Post-Reopening of Application

**Subject Line:** Complete your CFA® charterholder application

Our changes to the application process reflecting our updated work experience requirements have been made, and your application is now available.

We invite you to complete your application.

**CTA Button: Access Application**

Please note:

- We have migrated your information, including your references, to the new application. Please confirm that your information is still accurate.
- You must provide your work experience hours before you can submit your application.

Should you have any questions about your application, please contact us at [membership@cfainstitute.org](mailto:membership@cfainstitute.org). We look forward to reviewing your application.

Sincerely,

CFA Institute