

Application details

If your organisation is interested in becoming recognized under “Employer Recognition Program”, you will need to find out the rules. To apply or find out more about becoming a recognized Employer, please visit our website www.cfapoland.org.

Note: The provision of the following information is voluntary, but if it is not provided, CFA Society Poland may be unable to process your application.

Please print in **BLOCK LETTERS**.

Please read the Guide to the form carefully before you complete the application form.

Section A: Employer details

Name of Organisation:		
Division (if applicable):		
Address Line 1:		
Address Line 2:		
Postcode:		
Country:		
Telephone:		Fax:
Website address:		
Sector:	Public <input type="checkbox"/> Private <input type="checkbox"/>	

Section B: Employer’s contact (Details for any communications about this application)

Name:		CFA membership ID, if acceptable	
Office Address:			
Telephone:			
Position			
Email:			

Section C: Employee Information

How many Employees does your organisation currently have?	
How many CFA charterholders are there within your organisation?	
How many CFA candidates are there within your organisation?	
How many Investment Foundation holders are there within your organisation?	
How many CIPM charterholders are there within your organisation?	
How many CIPM candidates are there within your organisation?	

Section E: Plan details (Please indicate the track you wish to apply for)

Title	<input type="checkbox"/> Partner	<input type="checkbox"/> Prime Partner
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Section D: Demonstrating high standards of professional accountability

Asset Management Code		
Adoption of the AMC	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Date of introduction		
Public support of AMC	<input type="checkbox"/> Yes comments: <input type="checkbox"/> No	
Recommended / Not Recommended		
(Delete as appropriate)		
Comments		

GIPS Standards compliance		
GIPS Standards compliance	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Date of introduction		
Public support of AMC	<input type="checkbox"/> Yes comments: <input type="checkbox"/> No	
Recommended / Not Recommended		
(Delete as appropriate)		
Comments		

Issue identification and analysis (Ethics Training)		
Adoption of the AMC	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Date of introduction		
Public support of ethics training	<input type="checkbox"/> Yes comments: <input type="checkbox"/> No	
Recommended / Not Recommended		
(Delete as appropriate)		
Comments		

Section E: CFA Program Support

Recruitment Process		
In recruiting: "CFA/ CIPM/ Investment Foundation preferred"	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Comments		
Public information regarding CFA/ CIPM/ Investment Foundation candidates holders	<input type="checkbox"/> Yes comments: <input type="checkbox"/> No	
Recommended / Not Recommended (Delete as appropriate)		
Comments		

Financial support		
Payment for CFA Institute and Society dues	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Payment for CFA preparatory courses	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Make a significant contribution to essential fees (registration and exam)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recommended / Not Recommended (Delete as appropriate)		
Comments		

Study leave		
Grant paid study leave: minimum of 2 days per exam	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Give paid time off to sit exams	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recommended / Not Recommended (Delete as appropriate)		
Comments		

Section F: Learning and development standards

L&D		
Provide CFA Candidates with suitable opportunities to obtain experience in line with CFA credentials	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Provide a written policy for students studying CFA that covers financial support	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Confirm that trainees plan for candidates and CFA charterholders	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Provide learning and professional development opportunities for CFA members to support CE program	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Demonstrate a commitment to supporting students through to CFA membership	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recommended / Not Recommended (Delete as appropriate)		
Comments		

Section G: Visibility and support initiatives (sponsorship)

Conferences		
Financial support	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Expert support (speakers)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recommended / Not Recommended (Delete as appropriate)		
Comments		

CFA Institute Research Challenge/other student competitions		
Financial support	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Expert support (mentors, graders, judges)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recommended / Not Recommended (Delete as appropriate)		
Comments		

Other events/initiatives		
Financial support	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Expert support	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Recommended / Not Recommended (Delete as appropriate)		
Comments		

Section H: Important undertaking to be signed by a director or equivalent

We apply to be included on CFA Society Poland’s list of **Recognized Employers** and are willing and able to provide information in accordance with the requirements of CFA Society Poland

Signed:		Date:	
Name:			
Position:			

In support of this application, I agree that the organisation will: (please tick each box)

- Provide learning and developing program for CFA charterholders and candidates.
- Provide appropriate resources and procedures to provide quality staff development, including trainings.
- Provide quality assurance processes including nomination of person/s responsible for the program. recruiting, developing and monitoring the progress of candidates.
- Meet CFA Society Poland representative to ensure relevant documents are provided.

Any Questions

If you have any questions you can contact our team:

Email: office@cfa.com.pl

Website: www.cfapoland.org

How to submit your form

Please email your completed form to:

Monika Grabek: monika.grabek@poland.cfasociety.org