# CFA-ESG 报考指南

1、登陆 CFA 协会官网(http://www.cfainstitute.org),如果没有注册过,需要点击 create an account 注册一个账号。



#### 2、Programs 里面找到 ESG 项目





## 3、点击 register 后,再点击 enroll and register

4、考试注册费用 795 美元

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5、填写个人信息:报名时不需要证件,但是提供的姓名需和证件保持一致(surname 代表姓, given name 代表名)

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6、选择协会:中国大陆考生可选择香港协会(仅代表我想注册在香港协会)

Certificate in ESG Investing Registration Select Register Checkout * indicates a required field. Step 2 of 6	
* indicates a required field. Step 2 of 6	
Country     Personal Information       Country / Region *     Address       Hong Kong SAR     Employment Status       Residents of certain countries/regions may be prohibited by law from participating.     Personal Data Consent       Read the Office of Foreign Asset Control (OFAC) Compliance Policy.     Candidate Agreement	
Save and Continue         Review           Contact.Us         Privacy Policy         Cookies Policy         Terms & Conditions         © 2022 CFA Institute. All Rights	Reserved.

## 7、填写一个香港的地址

¢ CFA Institute	My.Account   Log
Certificate in ESG Investing Registration Select Register Checkout	
* indicates a required field.	Step 2 of 6
Address	V Personal Information
Country / Region * Hong Kong SAR <u>Change Country / Region</u>	Address
Residents of certain countries/regions may be prohibited by law from participating.	Employment Status
Read the Office of Foreign Asset Control (OFAC) Compliance Policy.	Personal Data Consent
Business / Building Name	Candidate Agreement
Address Line 1 *	Review
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8、填写就业状态,学生也可以考,选择对应的内容正常填写即可

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Select     Registration	
"indicates a required field.	Step 3 of 6
Employment Status Which best describes your current employment status?* Employed Setf-employed Student Unemployed Retired	Personal Information     Address     Employment Status     Personal Data Consent     Candidate Agreement
Save and Continue	Review
Contact.Us Privacy.Policy Cookies.Policy Terms & Conditions	© 2022 CFA Institute. All Rights Reserved.

# 9、授权使用个人信息的协议

Certificate in ESG Investing Registration		
Select Register Checkout		
indicates a required field.	Step 4 of 6	
Consent to Collect, Process, and Transfer Personal Data	Personal Information	
Summary of Key Points		
<ul> <li>Personal Information provided to CFA Institute and Prometric will be transferred to the United States or other jurisdictions that may not provide the same level of data protection as your own country.</li> </ul>	Address     Employment Status	
CFA Institute test center service providers may employ video surveillance and audio recordings at the test centers.		
The software used for online tests employs facial recognition technology and collects audio and video-recordings throughout the test.	Personal Data Consent	
Personal Information and Biometric Data will be transmitted and maintained securely.	Candidate Agreement	
As part of the registration and examination process, candidates must provide Personal Information to CFA Institute (915 E. High Street, Charlottesville, Virginia 22902 USA) for the purpose of administering the examination. CFA Institute collects, processes and maintains Personal Information in accordance with its <u>Privacy Policy</u> , which is also incorporated in the Candidate Agreement.	Review	
Your Personal Information will be transferred to the United States or other jurisdictions that may not provide the same level of data protection as your own country. Personal Information may also be transferred to certain third-party service provides of CFA Institute and CFA Institute offices in various jurisdictions in order to provide services related to the exam. We provide appropriate protections for cross-border transfers as required by law for international data transfers. With respect to transfers originating from the European Economic Area ("EEA"), we implement standard contractual clauses approved by the European Commission, and other more indications to address are paired for more an examinable that available to the service barder standard contractual clauses.		

## 10、考试协议

Certificate in ESG Investing Registration	
Select Register Checkout	
* indicates a required field.	Step 5 of 6
Candidate Agreement	Personal Information
Collapse All Expand All	🗸 Address
1. Legal Nature of Candidate Agreement.	Employment Status
By registering for the Certificate, you understand, accept, and agree to comply with the Candidate Agreement, as a from time to time. You understand that:	amended Versonal Data Consent
<ul> <li>CFA Institute has the authority to void your exam result, and reject, suspend, or terminate your candidacy at an your failure to comply with the Candidate Agreement;</li> </ul>	any time for Review
<ul> <li>disputes, claims, or controversies between you and CFA Institute will be resolved through binding arbitration a provided in Section 11 below;</li> </ul>	as expressly
<ul> <li>by agreeing to arbitration you are waiving your right to have any such Disputes heard and decided by a judge or</li> </ul>	or jury.
<ul> <li>you will not be a candidate for the Certificate unless and until CFA Institute has received full payment of your n fees.</li> </ul>	registration
2. Misconduct and Rules Violations.	~
Missonduct is any activity or conduct that compromises or attempts to compromise the regulation integrity validi	lity or

## 11、最后检查填写的内容

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Certificate in ESG Investing Registration Select Register Checkout	
Review	Step 6 of 6
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Name As Appears on Government Issued Photo ID	🗸 Employment Status
Sike Li	Personal Data Consent
25 April 1984	Candidate Agreement
Gender Male	Keview
Phone Number	
China +86 13; i47	
Address Edit>	
Address Line 1	

12、付款(可以使用支付宝,如支付宝支付时有问题,可选择添加信用卡)

Select Register Checkout	ation	
Credit Card	Order Summary	
Invoice (offline payments)	ESG Exam Registration	USD 540.00
	ESG eBook and Digital Curriculum	USD 135.00
◯ Voucher	Subtotal	USD 675.00
	Tax or VAT	USD 0.00
	Total	USD 675.00

(23年注册价格由 675 美元涨到了 795 美元)

## 13、成功缴费后,邮箱会收到收据

Sales Order_CS_97095029.pdf 35.17 KB		
CFA Ins	titute	
Thank you for yo Sincerely, CFA Institute	ir payment. Your detailed receipt is attached.	
	Contact Us   Manage Account © 2019 CFA Institute. All rights reserved. 915 East High Street, Charlottesville, VA 22902	

14、学习资料需付款后等待几小时后才能显示,刚付完款可能会显示只对付费用 户开放

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CFA Institute						
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