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201 Equal Opportunity

It is the established policy of CFA Institute not to discriminate against any individual employee, group of employees, or prospective employee on the basis of race, any traits associated with race, color, national origin, citizenship or immigration status, religion, creed or belief, age, marital or partnership status, marital or family status, care giver status, pregnancy and maternity, breastfeeding, sexual and other reproductive health decisions, physical abilities/qualities, disability, sexual orientation, gender, gender identity or expression, predisposing genetic characteristic, military or veteran status, status as a victim or witness of domestic violence or sex offense or stalking, unemployment status, infectious disease carrier status, migrant worker status, educational background, socio-economic status, geographic location and culture or any other basis protected by applicable law. This policy impacts all aspects of employment, including but not limited to, recruitment, training, development, performance, promotion, wages, demotion, and dismissal. This is a global policy that applies to all CFA Institute employees,

regardless of location. Additional information can be found by reviewing CFA Institute's [Global Policy Against Harassment, Discrimination, Bullying, Workplace Violence, and Retaliation](#).



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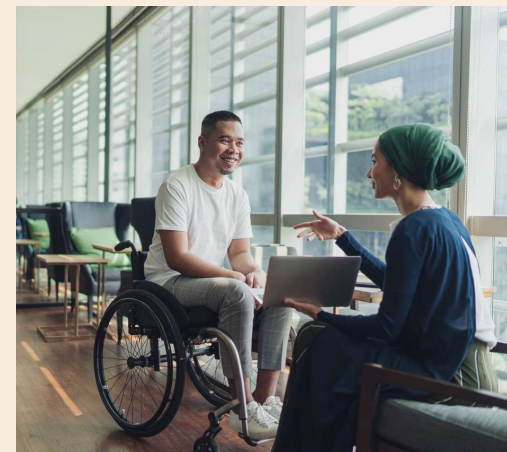
202 Workplace Accommodations

I. Workplace Disability, Illness, or Pregnancy Accommodations

CFA Institute provides reasonable accommodations for qualified individuals with disabilities or illness in accordance with applicable laws. CFA Institute also provides individualized, reasonable accommodations for any pregnancy or pregnancy-related condition. Employees who are pregnant or who are individuals with qualifying disabilities and who require reasonable accommodations should discuss potential accommodations with their immediate People Leader or People & Culture. It is the employee's responsibility to notify CFA Institute of the need for a reasonable accommodation and to provide medical documentation upon request and in accordance with applicable law. Medical information will be kept confidential to the extent feasible consistent with applicable laws. CFA Institute will evaluate accommodation requests and determine whether a reasonable accommodation can be provided.

II. Workplace Religious Accommodations

CFA Institute respects the religious beliefs and practices of all employees and will make, upon request, reasonable accommodations for such observances when a reasonable accommodation is available that does not create an undue hardship on the business. An employee whose religious beliefs or practices conflict with their job, work schedule, CFA Institute Dress Code, or with other aspects of employment, and who seeks a religious accommodation should discuss their request with their People Leader or People & Culture. The employee should identify the type of religious conflict that exists and the employee's suggested accommodation. CFA Institute will evaluate the request and determine whether a reasonable accommodation can be provided.



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203 Immigration Law Compliance

CFA Institute is committed to employing only individuals who have lawful work authorization. CFA Institute does not unlawfully discriminate based on citizenship or national origin. We comply with all applicable local laws and regulations.

In compliance with local laws and regulations we are required to ensure that an employee has the right to take up employment in the location in which they were hired, which may include inspecting documentation that establishes lawful work or residency status or identity.

Each job applicant or employee is required to present documentation that complies with applicable immigration laws and report any changes to their immigration status to People & Culture. Former employees who are re-employed may also be required to undergo the same verification process.

CFA Institute typically does not sponsor new employees for temporary work visas except in rare situations where CFA Institute is having difficulty finding qualified candidates for the role and it is necessary to meet a business need. In such cases, CFA Institute will pay the costs and

fees associated with the visa application (excluding costs for dependents). However, if before the one-year anniversary following visa issuance the employee resigns or is terminated for cause, the employee agrees to reimburse CFA Institute for all costs paid in connection with the visa application process (except those prohibited by law) as of the date of resignation/termination.

Where local law permits employers to sponsor foreign national employees for permanent residency status and depending on the needs of the business, CFA Institute may consider sponsoring an employee after 6 months of employment as long as they are meeting all performance expectations. Should CFA Institute decide to sponsor a foreign national for permanent resident status, CFA Institute reserves the right to make all decisions regarding preparation and filing of any and all necessary documentation. CFA Institute will accept responsibility for all fees and costs associated with the application on behalf of the employee (excluding dependents). However, if before the two-year anniversary following permanent residency issuance an employee decides to end employment with CFA Institute

for any reason, or requests CFA Institute cease processing the application for any reason, or if an employee is terminated for cause, the employee agrees to reimburse CFA Institute for all costs paid in connection with the application process (except those prohibited by law) as of the date of resignation/termination.

Employees with questions regarding immigration matters are encouraged to contact People & Culture or Corporate Advisory Services.

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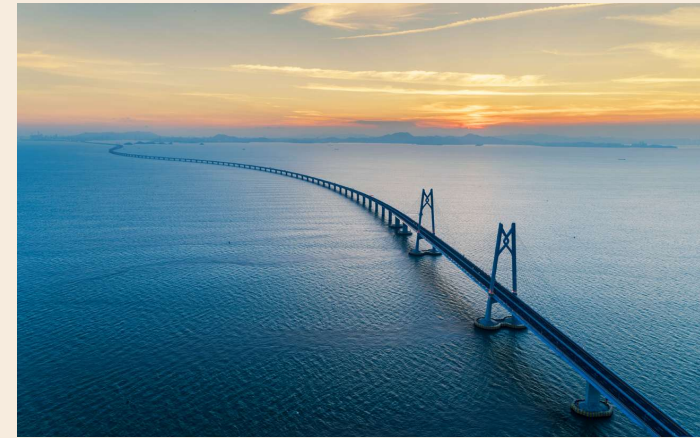
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204 Travel Solutions

All employees who engage in travel for CFA Institute business are responsible for reading and abiding by the terms of the [CFA Institute Travel Policy](#). Our Travel Policy is informed by a simple Travel Philosophy: Our employees and volunteers will travel safely and responsibly when their physical presence is required, and a virtual alternative is not appropriate, to ensure an optimal business outcome.

Visit the [Global Travel Solutions and Resources](#) page for the policy, travel planning, travel preparedness, destination safety and security information, and 24/7 on the ground medical and security support.

Questions about any of these resources or getting started with Travel should be directed to the global [Travel Helpdesk](#).



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The health and safety of our employees continues to be at the forefront of our planning business activities. To ensure this and compliance with local government regulations and health guidance, the Global Infectious Disease Procedures have been implemented. CFA Institute commits to regularly reviewing and updating these procedures when changes in local laws dictate and publish them in the [Policy and Procedure](#) repository as available.

