

Non-Staff Travel with CFA Institute

Booking Your Travel

CFA Institute requires all business travel to be arranged through our appointed Travel Management Company (TMC).

Before Travel Can Be Booked

You must complete a Personal Information (PII) Form and upload it to the designated secure site provided by the CFA Institute internal contact.

Once your profile has been created, the TMC will send personalized travel options that align with:

- CFA Institute travel policy
- Meeting requirements
- Your travel preferences

You may then:

- Select one of the proposed itineraries, or
- Work directly with the travel agent to discuss alternative options

Travel Planning Guidelines

To secure the best pricing and flight availability, all air, hotel, and ground transportation arrangements should be requested at least 21 days prior to departure whenever possible.

Cabin Class Eligibility

Overnight flights: Business Class is eligible. An overnight flight departs in the evening (between 5:00 PM and 1:00 AM) and arrives the following morning.

Daytime flights 5–9 hours: Premium Economy or Economy with seat upgrade

Daytime flights 9+ hours: Business Class

Hotel Guidelines

- CFA Institute preferred hotels should be used in CFA office locations where available
- In non-office locations, hotel rates should generally not exceed USD 500 per night

Ground Transport

If renting a vehicle for business travel, you should select an intermediate and/or mid-size car for reimbursement eligibility.

Making Changes

If changes are required, they should be coordinated through the TMC, with CFA Institute internal contact approval. Any additional costs will require approval.

Required Travel Documents

You are responsible for ensuring you possess all required travel documentation, including valid passports, visas, and any country-specific entry requirements

All travel arrangements are subject to approval by your CFA Institute internal contact.

Paying for Travel

CFA Institute's Travel Management Company will charge your travel reservations to a pre-approved CFA Institute Corporate Travel Account. In certain locations, a personal credit card may be necessary to secure a transient hotel stay.

If a hotel charge cannot be applied to the CFA Institute Corporate Travel Account on file with the agency, you are permitted to book your hotel accommodation directly with the hotel. In such cases, the requirement to book through the agency is waived.

Expense Reimbursement

All reimbursement requests are to be submitted to your CFA Institute internal contact. The following documentation is required to process the reimbursement:

- Completed CFA Institute Expense Reimbursement Form
- Detailed merchant receipts must accompany the reimbursement request and expenses incurred must comply with this policy.
- In case of missing receipts, a Missing Receipt Affidavit
- Reimbursement requests are to be submitted to your CFA Institute internal contact no later than the 15th of the month following when the expense was incurred.

Breakfast, lunch, dinner, snacks and beverages, room-service meals, related taxes & fees, and gratuities while traveling are capped at USD125 daily

Helpful Reminders

To help ensure a smooth travel experience and timely reimbursement process, please review the reminders below before and during your trip.

- Retain all itemized receipts for business-related expenses during travel
- Ensure your full legal name matches your government-issued identification when submitting travel details
- Verify that your passport, visa, and any required travel documentation are valid prior to departure
- Contact your CFA Institute internal contact as early as possible for any changes or disruptions to travel plans
- Once ticketed, review itinerary to ensure booked travel is correct
- Submit reimbursement requests and supporting documentation promptly following completion of travel
- Personal or non-business-related expenses are not eligible for reimbursement

For questions regarding travel arrangements, expenses, or travel policy guidance, please contact your CFA Institute internal contact.

For urgent travel disruptions (flight cancellations, delays, missed connections), please contact the Travel Management Company directly using the 24-hour support number provided in your itinerary confirmation.