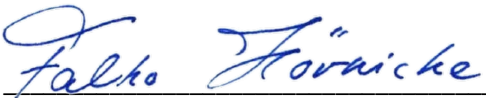


**Policy:** TravelEffective Date: March 17, 2021Confirmation: 

The CFA Society Los Angeles (“CFALA”) has created guidelines to support society representatives traveling to CFA Institute and other business related meetings. The guidelines are as follows:

**Travel**

CFALA will reimburse for Air (economy class) rail/rental car/taxi and parking expenses related to travel to the meeting. When extended flight times (3,000 miles, one segment, one way) are required, it is the policy of CFALA to allow representatives to book business class tickets. If your itinerary involves one or more segment(s) for personal or business purposes, any additional costs are your responsibility. CFALA will reimburse the cost of checking up to two bags (receipts are required) but will not reimburse charges incurred for oversized or overweight luggage.

**Lodging**

The standard policy is that up to 2 nights of lodging for a 3 day conference will be reimbursed. However, for some leadership meetings, it might be necessary to allow for additional lodging. CFALA will inform society representatives when departures from the standard policy are in place for a particular meeting.

**Personal Automobiles**

CFALA will reimburse personal car mileage between your home or office and the meeting destination up to the cost of a roundtrip airline or rail ticket booked prior to the deadline. Tolls will be reimbursed (receipts are required). Personal car mileage is reimbursed based on U.S. Internal Revenue Service (IRS) limits. By using a personal automobile for CFALA business, you accept responsibility for carrying adequate insurance coverage. CFALA does not provide collision or comprehensive automobile insurance for privately owned vehicles that might be involved in accidents while being used at a CFALA Institute meeting.

**Local Transportation**

CFALA covers the cost of local transportation while on business. This includes taxis and ride sharing services. The use of expensive private car services should be avoided.

At the Meeting Destination: When CFALA cannot arrange a group airport/rail shuttle, the cost of a taxi or shuttle service to the meeting destination will be reimbursed (receipts are required).

At Home: CFALA will reimburse tolls and personal vehicle mileage between the individual’s home or office and local airport or rail station, as well as parking fees (receipts are required).

**Visas**

CFALA will reimburse visa-related expenses including all consulate-related fees (receipts are required).

**Meals**

Reasonable food and beverage expenses during travel to and/or from (but not while on-site at) a society leadership meeting will be reimbursed (receipts are required). Society representatives are expected to use their professional judgment in determining what is “reasonable.” Please follow Government per diem guidelines [www.gsa.gov/perdiem](http://www.gsa.gov/perdiem)

**Tips**

Reasonable tips will be reimbursed.

**Non-Reimbursable Travel Expenses**

- Lost ticket fees
- Expenses incurred for flight changes due to non-emergencies
- Expenses for special seating or upgraded seats on your flight
- Travel expenses for family members
- Damage sustained on a personal or rental vehicle

CFALA cannot anticipate every possible travel scenario. If your situation is not addressed in this document, contact the Chief Executive Officer for guidance prior to confirming travel plans. Final decisions on reimbursement of travel expenses will lie with the Executive Committee.

\*\*\*\* END \*\*\*\*