



# Testing Accommodation Checklist for Candidates

Follow these steps to ensure your request for testing accommodations is successfully processed by the Financial Modeling Institute (FMI):

## 1. Understand the Policy

- Review the Testing Accommodations page on FMI's website.
- Submit your request at least 6 weeks before the exam registration deadline to allow sufficient processing time.

## 2. Gather Supporting Documentation

- **Required Documentation:** Obtain all documents related to your impairment(s) that support your request.
- **Documentation Standards:** Ensure that:
  - The assessment reflects your **current impairments and functional limitations**.
  - The assessment was completed **no earlier than 5 years before the exam date**.
  - All documents are clear, legible, complete, and up-to-date.
  - Documents are issued by a **certified medical professional**.
- **Medical Professional's Note/Letter:** The note or letter must:
  - Indicate the type of testing accommodation required.
  - Provide the rationale behind the recommendation.
  - Describe how the **diagnosis is currently managed** and how it was managed in the past, if applicable.
  - Include the **address and website** of the medical facility where the professional practices.

**Comfort Accommodations:** Certain items are pre-approved and do not require additional documentation. These include:

- Foam earplugs.
- Medicine (e.g., epinephrine pens, insulin pens).
- Braces (e.g., neck, arm, or leg braces).
- Water and a small snack.
- Pillow or lumbar support.
- Service animals.
- Tissues.
- Medical devices attached to the body (e.g., insulin pumps).
- Hearing aids.
- Calculators

### 3. Submit Your Request

- Email [info@fminstitute.com](mailto:info@fminstitute.com) to initiate your accommodation request.
- Attach all required documents to your email.

### 4. Plan for Future Exams

- If you retest in the future, you must resubmit updated documentation for reassessment, even if accommodations were approved previously.

#### Checklist Summary

- Review FMI's Testing Accommodations guidelines.
- Submit your request at least 6 weeks before the registration deadline.
- Gather and verify documentation:
  - Reflects current impairments and functional limitations.
  - Completed no earlier than 5 years before the exam date.
  - Includes a medical professional's note/letter with:
    - Type of testing accommodation required.
    - Rationale for the recommendation.
    - Current and, if applicable, past management of the diagnosis.
    - Address and website of the medical facility.
    - Clear, legible, complete, and up-to-date.
- Email your request and documents to [info@fminstitute.com](mailto:info@fminstitute.com).
- Utilize pre-approved comfort accommodations as needed.
- Plan for future submissions if retesting.

**By following this checklist, you can ensure a smooth and timely review of your request.**