

MEMBERSHIP

Screenshots of the Online Experience

as of October 2020

NOTE:

These screenshots are for demonstration purposes only. The text within the screenshots, including the fees associated with dues, may differ from the actual renewal experience.



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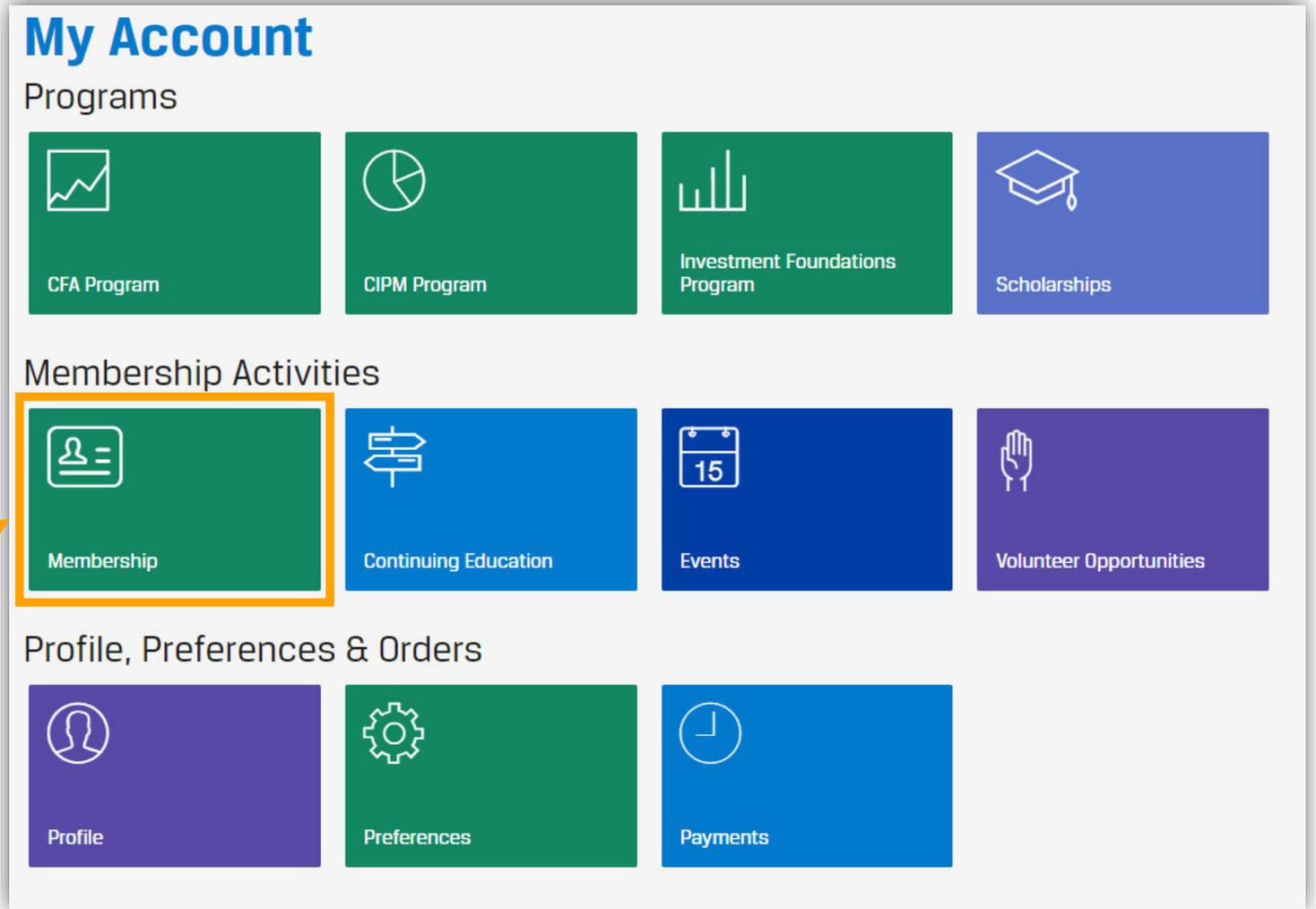
MY ACCOUNT: MEMBERSHIP TILE, PAYMENT TILE



1 MY ACCOUNT: MEMBERSHIP TILE

Membership transactions are handled via the Membership Tile. It is accessed in one of two ways:

1. Receive an email from CFA Institute and click the link to renew membership.
2. Log into cfainstitute.org and access "My Account" as seen here.



2 MY ACCOUNT: PAYMENT TILE

Receipts for membership transactions are presented at the end of the transaction but are also accessible via the Payments tile.

My Account

Programs

- CFA Program
- CIPM Program
- Investment Foundations Program
- Scholarships

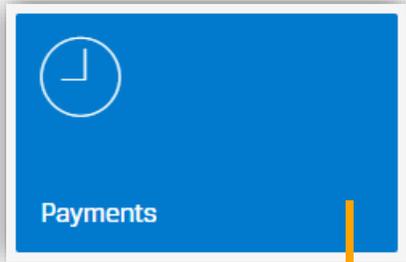
Membership Activities

- Membership
- Continuing Education
- Events
- Volunteer Opportunities

Profile, Preferences & Orders

- Profile
- Preferences
- Payments

2 MY ACCOUNT: PAYMENT TILE (CONT'D)



Payment History

Didn't find what you're looking for? Check our payment [archives](#) or [contact us](#).

Receipt Number	Amount	Transaction Date	Receipt Link
Sales Order #SO2801029006	US\$ 395	09 August 2019	View receipt

Note: All fees are shown in US Dollars.

A screenshot of a receipt from the CFA Institute. The receipt includes the CFA Institute logo and name, address (915 East High Street, Charlottesville VA 22902, United States), and the word "Receipt" in the top right. It is divided into sections: "Customer Contact Information" (Mr. XX XXX, Address: XXX XXX Hong Kong), "Order Summary" (CFA Institute Dues Year Ending 30 June 2020 \$275, CFA Society Hong Kong Year Ending 30 June 2020 \$120), "Payment Details" (Receipt Number: CS2801020644, Sales Order Number: SO2801029006, Payment Date: 09 August 2019, Payment Method: Visa, Total: \$395.00), and a final summary (Sub Total \$395.00, Tax \$0.00, Total \$395.00). An orange arrow points from the "View receipt" link in the Payment History table to the "Order Summary" section of the receipt.

CFA Institute

CFA Institute
915 East High Street
Charlottesville VA 22902
United States

Receipt

Customer Contact Information
Mr. XX XXX
Address:
XXX
XXX
Hong Kong

Order Summary

CFA Institute Dues Year Ending 30 June 2020	\$275
CFA Society Hong Kong Year Ending 30 June 2020	\$120

Payment Details

Receipt Number:	CS2801020644
Sales Order Number:	SO2801029006
Payment Date:	09 August 2019
Payment Method:	Visa
Total:	\$395.00

Sub Total \$395.00
Tax \$0.00
Total \$395.00

REGULAR MEMBER – RENEW

Note: Some societies only accept CFA charterholders for regular membership; affiliate membership may not be an option in all societies.



REGULAR MEMBER – RENEW | RENEW MEMBERSHIP

This screenshot shows a regular member who needs to renew their membership. In this example, their membership expired, or lapsed, as of 30 June 2018.

- The top portion highlights the importance of CFA Institute and society membership.
- The bottom portion displays the person's most recent membership(s).

Manage Your Membership

Annual Renewal

Your membership(s) expired on **30 June 2018**.

As a CFA Institute **Regular** member, you are part of a global community with shared values of integrity and competency in investment practice. Your active participation in CFA Institute and a CFA society contributes to shaping the investment profession for the better. Through your voluntary society membership, you support the vital functions of ethical and educational leadership in your local community. You will have the opportunity to modify your society membership(s) during the renewal process. Your request is subject to the rules and procedures of your proposed society.

Membership(s) to be renewed:

- CFA Institute
- CFA Society Hong Kong

[Renew Now](#)

CFA Institute

Expired
30 June 2018
 Regular Member

CFA Society Membership(s)

CFA Society Hong Kong

Expired
30 June 2018
 Regular Member

In the first step of the renewal process, they **verify** their personal and professional information. They also complete their Professional Learning (PL) attestation.

- If any personal and/or professional information is missing, they cannot proceed until they update their information.
- They must make a selection for PL attestation.

They can "save and continue" only after completing all required fields.



We are missing some details in your Personal Information. [Complete Personal Information](#)

We are missing some details in your Professional Information. [Complete Professional Information](#)

Please review the information below and make any necessary edits.

Personal Information [Edit](#)

Mailing Address

XXX
XXXX
XXXXX
Hong Kong

Phone

+852 xxxx xxxx

Secondary Email

none provided

Professional Information [Edit](#)

Employment Status

Employed

Employer / Firm Name

XXXXXX

Employer Type

none provided

Occupation

XXXXXX

Job Title

XXXXXX

I confirm that the above information is accurate and correct. *

Professional Learning

Improving professional competence is an important part of our Code of Ethics and Standards of Professional Conduct. We recommend that members complete a minimum of 20 Professional Learning credits that include 2 Standards, Ethics, and Regulations (SER) credits each year.

I attest that I have/will have completed the recommended 20 Professional Learning credits, including 2 SER credits, in the period from 01 January 2018 to 31 December 2018. *

Yes

No

If they need to update their personal information, they do so here.

Should they "save and continue" without completing all of the required fields, an error message displays, and they cannot leave this page until they provide the missing information.

 Country / Region Code is a required field. [Edit](#)
Please enter a valid number. [Edit](#)

Note: "Primary Phone Number" includes the Country/Region Code, and all non-numerical characters have been removed from the "Phone Number."

Please review the information below and make any necessary edits.

Personal Information

Name
XXXXXX

Country / Region
HK [Change Country / Region](#)

Business / Building Name
XXXXXX

Address Line 1 *
XXXXXX

Address Line 2
XXXXXX

City *
Hong Kong

State / Province
Hong Kong

Postal Code *
XXXXXX

Primary Phone Number

Country / Region Code	Phone Number
Select Country / Region Code ▼	+852 xxxx xxxx

Secondary Email Address
This will only be used if we cannot reach you at your primary email address; it will not be used for marketing purposes or shared outside of CFA Institute and member societies.

[Save and Continue](#)

1 REGULAR MEMBER – RENEW | VERIFY PROFESSIONAL INFORMATION

If they need to update their professional information, they do so here.

Should they "save and continue" without completing all of the required fields, an error message displays, and they cannot leave this page until they provide the missing information.

 Type of Employer / Firm is a required field. [Edit](#)

A confirmation displays when they successfully update their information.

The following slide shows additional screenshots associated with updating Professional Information.

Please review the information below and make any necessary edits.

Professional Information

Employment Status
Employed [Change Current Employment Status](#)

Employer / Firm Name *
CIBC World Markets Inc

Type of Employer / Firm *
Select Employer / Firm Type

Job Title *
Investment Advisor Assistant

Current Occupation *
Financial Adviser/Planner/Wealth Manager

[Save and Continue](#)

Employer / Firm Type Dropdown List

Select Employer / Firm Type

- Accounting Firm
- Asset Management/Investment Firm
- Brokerage
- Business or Knowledge Process Outsourcing (BPO/KPO)
- Central Bank
- Commercial Bank
- Consulting Firm
- Credit Rating Agency/Firm/Bureau
- Endowment
- Government or Regulator
- Information Technology or Software
- Insurance
- Investment Bank
- Manufacturing
- Pension Fund
- Private Wealth Management Firm/Family Office/Trusts
- Securities Exchange
- Sovereign Wealth Fund
- University/Educational Institution

Select Employer / Firm Type

Dropdown List - Continued

Utilities (e.g., Oil and Gas, Energy)
 Verification Firm
 Other (please specify)

Occupation Dropdown List

Select Occupation

- Accountant or Auditor
- Chief Executive Officer (CEO)
- Chief Financial Officer (CFO)
- Chief Investment Officer (CIO)
- Compliance Analyst/Officer
- Consultant
- Corporate Financial Analyst
- Credit Analyst
- Economist
- Financial Adviser/Planner/Wealth Manager
- Financial Examiner
- Information Technology
- Investment Consultant
- Investment Strategist
- Manager of Managers
- Performance Analyst
- Portfolio Manager
- Professor/Academic
- Regulator

Select Occupation

Dropdown List - Continued

Relationship Manager/Account Manager
 Research Analyst, Investment Analyst, or Quantitative Analyst
 Risk Analyst/Manager
 Sales Agent (Securities, Commodities, Financial Services)
 Trader
 Other (please specify)

Change Current Employment Status

Professional Information

Employment Status

Employed [Change Current Employment Status](#)

Please review the information below and make any necessary edits.

Professional Information

Which best describes your current employment status? *

Employed
 Self-employed
 Student
 Unemployed
 Retired

[Save and Continue](#)

Professional Information [Edit](#)

Employment Status
 Unemployed

Employed and Self-employed must provide employer information.
 Student, Unemployed, and Retired do not.

- Employed fields to complete: Employer/Firm Name, Type of Employer/Firm, Job Title, and Current Occupation
- Self-Employed fields to complete: Type of Employer/Firm, Job Title, and Current Occupation

In the second step of the renewal process, they complete their **attestations**.

This is the Professional Conduct Statement (PCS). All fields are required in order to "save and continue."

Note: For each "Yes," they must provide the matter's Current Status. There is an optional text box to provide additional information as well.

CFA Institute Professional Conduct Statement

As a member of CFA Institute, you are required to answer the following questions. If any answer is "yes," the matter described in questions must be disclosed.

I certify that my answers below are accurate, truthful, and complete. I also agree to notify CFA Institute promptly of any changes that would require a different response to any of the following questions: *

1. Have you ever been the subject of any written complaint or accusation regarding your professional conduct or activities? *
 No
 Yes
2. Have you ever been the subject of any investigation (internal or external) in which your professional conduct or activities were questioned or at issue? *
 No
 Yes
3. Have you ever been the subject of, or a defendant or respondent in, any litigation, arbitration, or other action or proceeding in which your professional conduct or activities were questioned or at issue? *
 No
 Yes
4. Have you ever been reprimanded, censured, restricted, suspended, barred, enjoined, or otherwise sanctioned by any regulator, professional organization, government agency, or court because of your professional conduct or activities? *
 No
 Yes
5. Have you ever been accused of, been convicted of, or pleaded guilty to, any crime relating to your professional conduct or activities? *
 No
 Yes
6. Have you ever been accused of, been convicted of, or pleaded guilty to, any crime (regardless of whether it involved your professional conduct or activities) that could have resulted in a sentence of more than one year in prison? *
 No
 Yes

Current Status *

Please select the appropriate response

- Please select the appropriate response
- Matter not previously disclosed to CFA Institute
- Matter currently under investigation by CFA Institute
- Matter previously investigated by CFA Institute; review concluded

They then complete the CFA Institute Membership Agreement.

Note: This new agreement is much longer than in the past. It goes more in depth to cover our privacy policy and trademark guidelines.

CFA Institute Membership Agreement

Individual members of CFA Institute must read and agree to the following:

- 1 You have read, understand, and agree to comply with the CFA Institute Code of Ethics, Standards of Professional Conduct, Bylaws, and Rules of Procedure for Professional Conduct ("Governing Documents") and other rules and regulations established by CFA Institute as amended from time to time.
- 2 You acknowledge and understand that failure to comply with the Governing Documents is grounds for disciplinary action against You and that a failure to cooperate with any CFA Institute investigation of Your conduct is grounds for summary suspension.
- 3 You hereby acknowledge that the information provided in this Membership Renewal is true, correct, and complete in all respects.
- 4 You acknowledge, agree, and, where necessary, consent to the processing of Your personal data as described in the CFA Institute Privacy Policy. You understand that You may request access and the opportunity to modify or delete certain portions of Your personal data to the extent permitted by applicable law by contacting CFA Institute as described in the "Contact Us" section at the end of the CFA Institute Privacy Policy.
- 5 Subject to the terms and conditions of this Member's Agreement, CFA Institute hereby grants to You, during the Term of this license to use the CFA designation and related certification marks, a non-transferable, and non-sublicensable right and license to use this designation other than pursuant to the terms of this Member's Agreement.
- 6 Subject to the terms and conditions of this Member's Agreement, CFA Institute hereby grants to You, during the Term of this license to use the CFA designation and related certification marks, a non-transferable, and non-sublicensable right and license to use this designation other than pursuant to the terms of this Member's Agreement.
- 7 If you are permitted to use the CFA designation and/or certification marks, you agree that any use of that Certification Mark by You, will be in compliance with the CFA Institute Trademark Guidelines, and that that Certification Mark certifies the company, or company logo, as the holder of the CFA designation and/or certification marks.
- 8 You hereby acknowledge and agree that, as between the parties, CFA Institute is the sole and exclusive owner of the Certification Marks and the registrations and applications therefor. CFA Institute may, in its sole discretion, maintain or discontinue the maintenance of such applications and registrations for the Certification Marks at any time.
- 9 Nothing contained in this Member's Agreement shall be construed as an assignment to You of any right, title, or interest in or to a Certification Mark. You recognize and acknowledge that the Certification Marks and all rights therein and goodwill pertaining thereto solely and exclusively belong to CFA Institute. You agree not to directly or indirectly attack or impair the title of CFA Institute to the Certification Marks, the validity of this Member's Agreement, or any of CFA Institute's registrations or applications relating to the Certification Marks.
- 10 You acknowledge the importance to CFA Institute of its reputation and goodwill and to the public of maintaining high, uniform standards of quality in the services provided under the Certification Marks. You agree that CFA Institute will have the right, but not the obligation, to monitor the provision of services provided by You in association with the Certification Marks and that, in the event CFA Institute determines that the quality of those services does not meet the standards set by CFA Institute, including the standards in the Governing Documents, CFA Institute may terminate the license upon prior notice. You acknowledge and agree that the final determination with respect to the termination of this license shall be made by CFA Institute. Upon termination of this license for any reason whatsoever, You agree to immediately cease any and all use or display of all Certification Marks for any purpose whatsoever. In the event that this license terminates in accordance with the terms of this Member's Agreement, You will not be entitled to any refund of any fees already paid or owing as of the date of termination.

I have read, understood, and agree to the terms of the CFA Institute Member's Agreement. *

[Save and Continue](#)

By continuing, you agree to our [Terms & Conditions](#) and [Privacy Policy](#).

3 REGULAR MEMBER – RENEW | SELECT – DUES & TOTAL AMOUNT DUE

The third step of the renewal process displays their most recent active memberships and the total amount due.

Regular members can opt to add, replace, or remove a society here, which is detailed in the remainder of this document. Affiliate members must have approval by a new society in order to replace or add a society.

Note: Some societies only accept CFA charterholders for regular membership; affiliate membership may not be an option in all societies.

When making a donation to the CFA Institute Research Foundation, members are asked, "How should we identify you?"

- Show my Name
- Anonymous
- Donate on behalf of [text field]

Membership

Verify Attest **Select** Checkout

CFA Institute Dues	\$275.00
CFA Society Hong Kong	\$120.00

[Replace/Remove](#)

[+ Add a new Society](#)

SubTotal **\$395.00**



CFA Institute
Research
Foundation

The mission of the Research Foundation is to fund and publish high-quality, independent research relevant to the global investment community. Your support helps us freely distribute this content and improve the knowledge base of investment professionals worldwide.

I will support the mission of the Research Foundation with my donation of:

\$0 \$10 \$25 \$50 \$100 \$250

Total **\$395.00**

[Proceed to Payment](#)

4

REGULAR MEMBER – RENEW | CHECKOUT

The fourth step of the renewal process is the **checkout**. This is where they select their payment option.

Optional: They can answer the question about Employer Support.

Screenshots of the payment options are included at the [end of this document](#).

- Credit Cards. In November 2019, China UnionPay was added as a credit card option.
- Digital Wallets. In December 2019, the first digital wallet was launched, AliPay.
- Invoice. In May 2020, an invoicing option was added.

The screenshot shows a web interface for the 'Membership' checkout process. At the top, there is a navigation bar with four tabs: 'Verify', 'Attest', 'Select', and 'Checkout'. The 'Checkout' tab is currently selected and highlighted in a dark grey box. Below the navigation bar, there are three radio button options for payment methods: 'Credit / Debit Card', 'AliPay' (which is selected), and 'WeChat Pay'. Below these options is the AliPay logo and a message: 'You will be redirected to AliPay to complete the transaction'. Further down, there is a section titled 'Employer Support' with the text 'My employer reimburses me for part or all of this payment.' and two radio button options: 'Yes' and 'No'. At the bottom, there is a section titled 'Why We Ask' with the text: 'We are constantly working to increase awareness of the CFA Charter and support for members from employers in the Investment profession. Your response helps to guide our actions in this area.'

They receive an order confirmation.

- "What's Next?" goes to the CFA Institute Member Benefits web page.
- They can download their receipt here or from the Payment tile.

Note:

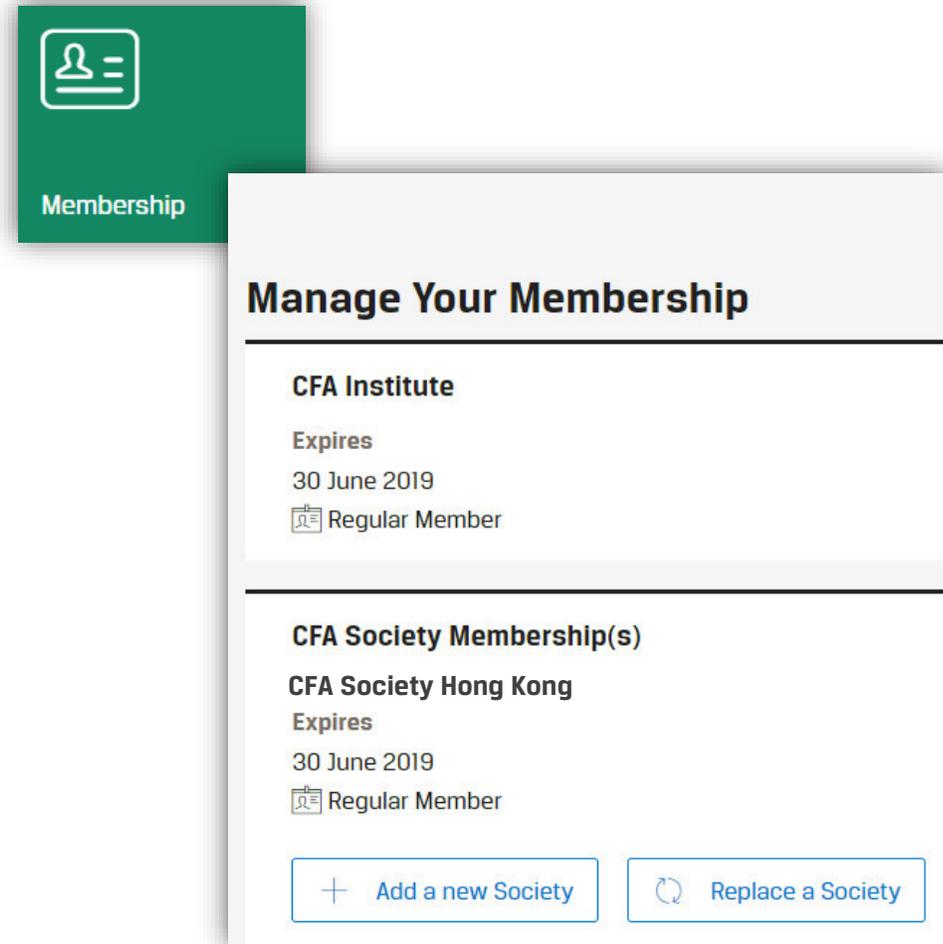
It may take a few minutes for their information to update on the Membership Tile.

The screenshot displays the 'Membership' checkout page. At the top, there are navigation tabs: 'Verify', 'Attest', 'Select', and 'Checkout' (which is highlighted). Below the tabs, the main content area is divided into two columns. The left column contains a 'Thank You!' message with the order number #S02801007995, a note about email confirmation, and a warning that it may take a few minutes to see the updated membership status. Two buttons are provided: 'What's Next?' (a solid blue button) and 'Download Receipt' (a white button with a blue border). The right column contains an 'Order Summary' table.

Order Summary	
CFA Institute Dues	\$275.00
CFA Society Hong Kong	\$120.00
SubTotal	\$395.00
Tax	\$0.00
Total	\$395

REGULAR MEMBER – RENEW | **MEMBERSHIP UPDATED**

Their updated memberships details display via the Membership tile.



The image shows a green 'Membership' tile with a person icon and a list of membership details. The expanded view shows two memberships: 'CFA Institute' and 'CFA Society Hong Kong', both expiring on 30 June 2019 and categorized as 'Regular Member'. There are buttons to 'Add a new Society' and 'Replace a Society'.

Membership

Manage Your Membership

CFA Institute

Expires
30 June 2019
📅 Regular Member

CFA Society Membership(s)

CFA Society Hong Kong

Expires
30 June 2019
📅 Regular Member

[+ Add a new Society](#) [🔄 Replace a Society](#)

REQUEST PROFESSIONAL LEAVE

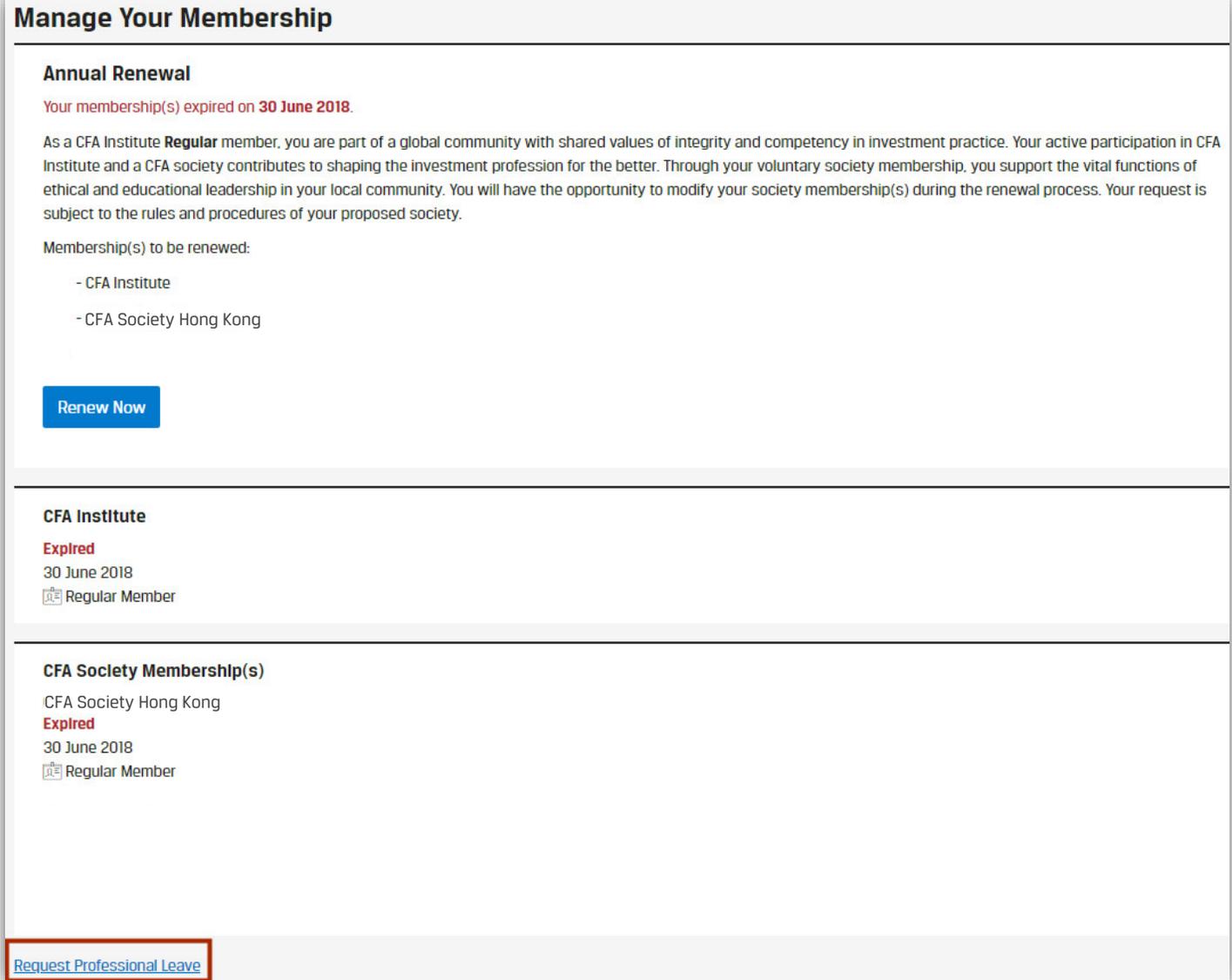


1 REQUEST PROFESSIONAL LEAVE

Professional Leave, formerly called "retired," applies to all active memberships. When they request Professional Leave, it is processed immediately online, meaning there is no application sent to the society for approval.

The "Request Professional Leave" option is not available to those who have less than 5 years of paid membership.

CFA Institute may grant exceptions to this rule during sustained periods of global economic hardship.



Manage Your Membership

Annual Renewal
Your membership(s) expired on **30 June 2018**.

As a CFA Institute **Regular** member, you are part of a global community with shared values of integrity and competency in investment practice. Your active participation in CFA Institute and a CFA society contributes to shaping the investment profession for the better. Through your voluntary society membership, you support the vital functions of ethical and educational leadership in your local community. You will have the opportunity to modify your society membership(s) during the renewal process. Your request is subject to the rules and procedures of your proposed society.

Membership(s) to be renewed:

- CFA Institute
- CFA Society Hong Kong

[Renew Now](#)

CFA Institute
Expired
30 June 2018
Regular Member

CFA Society Membership(s)
CFA Society Hong Kong
Expired
30 June 2018
Regular Member

[Request Professional Leave](#)

2 REQUEST PROFESSIONAL LEAVE

They must check each box and select a reason for requesting professional leave. These reasons appear on both the contact record and in the society's Membership reports in Salesforce.

Professional Leave

 Professional Leave will apply to the following memberships:

- CFA Institute
- CFA Society Hong Kong

If you are currently unemployed and/or you are not currently engaged in professional activities which qualify as acceptable work experience, you may be eligible for Professional Leave. To request Professional Leave, review the rules and requirements below and confirm your compliance by checking each box.

- I am not currently engaged in professional activities which qualify as acceptable work experience (as described in the [Work Experience Guidelines](#) section of the CFA Institute website) to receive the CFA Charter or qualify for Regular membership in CFA Institute. *
- I agree that I will promptly notify CFA Institute if I resume professional activities as described above. *
- I acknowledge that I remain obligated to comply with all aspects of the CFA Institute Professional Conduct Program, including submission of an annual Professional Conduct Statement, compliance with the Bylaws, Code of Ethics and Standards of Professional Conduct, and Rules of Procedure Related to Professional Conduct, and that I remain subject to disciplinary action for a violation thereof. *

Reason for requesting professional leave *

Please provide a reason

Request

[Cancel](#)

Reason for requesting professional leave *

Please provide a reason

Please provide a reason

Change of profession

Family, health, personal

Currently unemployed

Full-time student

Retired

3 REQUEST PROFESSIONAL LEAVE

Professional Leave

✔ Your request for Professional Leave has been submitted. Your updated status will appear in your Profile shortly.

[Return to Membership Profile](#)

A confirmation message displays, and the Professional Leave status displays in the membership details.

Manage Your Membership

Annual Renewal

Your membership(s) expired on **30 June 2018**.

As a CFA Institute **Regular** member, you are part of a global community with shared values of integrity and competency in investment practice. Your active participation in CFA Institute and a CFA society contributes to shaping the investment profession for the better. Through your voluntary society membership, you support the vital functions of ethical and educational leadership in your local community. You will have the opportunity to modify your society membership(s) during the renewal process. Your request is subject to the rules and procedures of your proposed society.

Membership(s) to be renewed:

- CFA Institute
- CFA Society Hong Kong

[Renew Now](#)

CFA Institute

Expired

30 June 2018

 Professional Leave [Change Status](#)

CFA Society Membership(s)

CFA Society Hong Kong

Expired

30 June 2018

 Professional Leave [Change Status](#)

RETURN FROM PROFESSIONAL LEAVE



They can return from professional leave by clicking "Change Status."

Manage Your Membership

Annual Renewal

Your membership(s) expired on **30 June 2018**.

As a CFA Institute **Regular** member, you are part of a global community with shared values of integrity and competency in investment practice. Your active participation in CFA Institute and a CFA society contributes to shaping the investment profession for the better. Through your voluntary society membership, you support the vital functions of ethical and educational leadership in your local community. You will have the opportunity to modify your society membership(s) during the renewal process. Your request is subject to the rules and procedures of your proposed society.

Membership(s) to be renewed:

- CFA Institute
- CFA Society Hong Kong

[Renew Now](#)

CFA Institute

Expired

30 June 2018

 Professional Leave

[Change Status](#)

CFA Society Membership(s)

CFA Society Hong Kong

Expired

30 June 2018

 Professional Leave

[Change Status](#)

2 RETURN FROM PROFESSIONAL LEAVE

They can easily resume full membership by clicking the checkbox. The confirmation message display below.

Professional Leave

 You are currently on Professional Leave status for the following memberships:

- CFA Institute
- CFA Society Hong Kong

If your professional activities have changed and/or you no longer qualify for Professional Leave status (as described in the [Work Experience Guidelines](#) section of the CFA Institute website), you may resume full membership below.

I no longer qualify for Professional Leave and/or I wish to resume full CFA Institute membership. *

[Resume Full Membership](#) [Cancel](#)

Professional Leave

 Your request to resume full membership has been submitted. Your updated status will appear in your Profile shortly.

[Return to Membership Profile](#)

3 RETURN FROM PROFESSIONAL LEAVE

Their updated membership status displays in their membership details. "Regular Member" now displays instead of "Professional Leave."

Manage Your Membership

Annual Renewal

Your membership(s) expired on **30 June 2018**.

As a CFA Institute **Regular** member, you are part of a global community with shared values of integrity and competency in investment practice. Your active participation in CFA Institute and a CFA society contributes to shaping the investment profession for the better. Through your voluntary society membership, you support the vital functions of ethical and educational leadership in your local community. You will have the opportunity to modify your society membership(s) during the renewal process. Your request is subject to the rules and procedures of your proposed society.

Membership(s) to be renewed:

- CFA Institute
- CFA Society Hong Kong

[Renew Now](#)

CFA Institute

Expired

30 June 2018

 Regular Member

CFA Society Membership(s)

CFA Society Hong Kong

Expired

30 June 2018

 Regular Member

[Request Professional Leave](#)

1 CHECKOUT – CREDIT CARD

If they choose to pay via credit card, they are prompted to enter their credit card details, including the Security Number. This is a 3-digit number on the back of most credit cards and a 4-digit number on the front of American Express cards.

Verify Attest Select **Checkout**

Credit / Debit Card
 AllPay



Required *
Credit Card Number *

Expiration Date *
 --

Security Number *
 ?

Name on Card *

Employer Support
My employer reimburses me for part or all of this payment.
 Yes No

Why We Ask
We are constantly working to increase awareness of the CFA Charter and support for members from employers in the Investment profession. Your response helps to guide our actions in this area.

Order Summary

CFA Institute Dues	\$275.00
CFA Society Hong Kong	\$120.00
SubTotal	\$395.00
Tax	0
Total	\$395.00

2 CHECKOUT – CREDIT CARD – CONFIRM ORDER

They confirm their information prior to placing the order. Once they place their order, the Order Confirmation page displays.

The screenshot displays a checkout interface with a navigation bar at the top containing 'Verify', 'Attest', 'Select', and 'Checkout' (the active tab). The main content is divided into two columns. The left column, titled 'Payment Type', shows a VISA card ending in 1111, owned by Violette Gorden, with an expiration date of 10/2020. The right column, titled 'Order Summary', lists the following items and amounts:

CFA Institute Dues	\$275.00
CFA Society Hong Kong	\$120.00
SubTotal	\$395.00
Tax	\$0.00
Total	\$395.00

At the bottom of the page, there are two buttons: 'Back' and 'Place Order'.

1 CHECKOUT – INVOICE

If they choose to pay by invoice, a list of payment methods is provided.

The system then confirms paying by invoice as the payment type prior to placing the order.

Membership

Verify Attest Select **Checkout**

- Credit Card
- AliPay
- Pay By Invoice**

You will receive an invoice, which you can pay via the following methods:

- Wire transfer or ACH
- Personal check, corporate check, or bank check (i.e., certified check, cashier's check)
- Money order or postal order

Invoice Summary

CFA Institute Dues	USD 275.00
CFA Society Hong Kong	\$120
Subtotal	USD 395
Tax or VAT	USD 0.00
Total	USD 395

Membership

Verify Attest Select **Checkout**

Employer Support

My employer reimburses me for part or all of this payment.

Yes No

Why We Ask

We are constantly working to increase awareness of the CFA Charter and support for members from employers in the Investment profession. Your response helps to guide our actions in this area.

[Continue](#) [Back](#)

Membership

Verify Attest Select **Checkout**

Payment Type

To confirm you will pay your membership dues with an invoice, click "Place Order" below.

Invoice Summary

CFA Institute Dues	USD 275.00
CFA Society Hong Kong	USD 120.00
Subtotal	USD 395.00
Tax or VAT	USD 0.00
Total	USD 395.00

[Place Order](#) [Back](#)

2 CHECKOUT – INVOICE – INVOICE INFORMATION

The system generates the invoice.

Membership

Verify Attest Select **Checkout**

Membership Dues Invoice Information

Order #: SO2801079662

An email with your invoice will be sent shortly. You may also download the invoice below.

Invoice Information:

- Payment instructions are included on the invoice.
- Any payment received that does not equal the invoice amount will not be accepted and will be returned.
- After we receive your payment, allow up to 5 business days for your payment to be processed. When processing is complete, an email confirmation will be sent to you.
- This invoice will expire in 30 days if payment is not received and your membership will not be complete.
- If you no longer wish to pay with this invoice, you can cancel it through the membership area of your account and then follow the steps to complete the online membership process.

[What's Next?](#) [Download Invoice PDF](#)

Invoice Summary

CFA Institute Dues	USD 275.00
CFA Society Hong Kong	USD 120.00
Subtotal	USD 395.00
Tax or VAT	USD 0.00
Total	USD 395.00

- Payment instructions are included on the invoice.
- Payment received must match the amount due; otherwise, payment will be returned.
- It may take up to 5 business days for payment to be processed.
- Invoices expire in 30 days.
- Invoices can be canceled. (See next page.)



915 East High Street
Charlottesville VA 22902
United States

Lgcybup cfajarquote
477 Madison Ave
CFA Building
New York NY 10022
United States

Invoice Details	
Invoice Number:	SO2801031578
Invoice Date:	11 September 2019
Due Date:	11 October 2019

Order Summary

CFA Institute Dues - Year Ending 30 June 2021	USD 275.00
CFA Society Hong Kong Dues- Year Ending 30 June 2021	USD 120.00
Subtotal	USD 395
Tax or VAT	USD 0.00
Total	USD 395

All fees are shown in US Dollars. Once received, it may take up to 5 business days to process your payment. When your payment is processed, a receipt will be emailed to you and your transaction for the current member year will be complete. Note that unpaid invoices will expire from our system after 30 days. We are unable to accept a payment if the invoice is expired.

Payment Detail

Please make checks payable to CFA Institute and include your invoice number.

Personal, Corporate, or Bank Check (i.e. Certified Check, Cashier's Check)

Money or Postal Order

Wire or ACH (instructions below)

Company Name: CFA Institute
Company Account Number: 20000000009919
Bank Name: JPMorgan Chase Bank
Bank Address: 270 Park Avenue, New York, NY 10017

For Wire Transfers: Bank ABA or Routing Number: 021000021
JPMorgan Chase SWIFT Code: CHASUS33 (Recommended instead of the ABA or Routing number for international wire transfers)
For ACH Payments: Bank ABA or Routing Number 028000024

To avoid delays in processing your payment, please have your bank include your invoice number. To pay by phone, call our [toll-free number](#) for your country or region.

Contact and Tax Information

Mail or fax this form to: CFA Institute PO Box 2082 Charlottesville, VA 22902-2082 USA Fax: +1(434) 951-5240 Have a Question? Phone: +1 (434)-951-5499 Email: info@cfa-institute.org Find a toll free number for your country at cfa-institute.org/en/utility/phone-numbers	Tax Information W-9 Information CFA Institute is a Virginia Corporation USA Fed. I.D. #54-1386480 Canada GST #R124134602 India PAN #AAFCC6849P
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1 of 1

3 MANAGE YOUR MEMBERSHIP – INVOICE – DOWNLOAD / CANCEL

From the Membership tile, they can download their invoice or cancel their invoice.

My Account

Programs

- CFA Program
- CIPM Program
- Investment Foundations Program
- Scholarships

Membership Activities

- Membership**
- Continuing Education
- Events
- Volunteer Opportunities

Profile, Preferences & Orders

- Profile
- Preferences
- Payments

Membership

Manage Your Membership

Manage Your Membership

You have a pending invoice for your membership dues payment

Please complete your payment by the date indicated on the invoice or it will expire. If it expires, you can begin the membership process again to pay online or download a new invoice.

[Download Invoice PDF](#)

Note that we are unable to accept a payment for an invoice that has been canceled. If you cancel your invoice, you can begin the membership process again to pay online or download a new invoice.

[Cancel Invoice](#)

Cancel Your Invoice

You are about to cancel your invoice for your Membership dues.

I confirm that I wish to cancel my invoice and that CFA Institute is unable to accept a payment for an invoice that has been canceled. I understand that after the invoice is canceled, I can begin the membership process again to pay online or download a new invoice.

[Cancel Invoice](#) [Back](#)

Cancel Your Invoice

✔ Your request to cancel your invoice has been submitted and may take up to one hour to process. Once your cancellation is finalized, you can complete the membership process through your account.

[Back to Manage Your Membership](#)