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.
MY ACCOUNT: MEMBERSHIP TILE, PAYMENT 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.
Receipts for membership transactions are presented at the end of the transaction but are also accessible via the Payments tile.
Note: All fees are shown in US Dollars.
REGULAR MEMBER – RENEW

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

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

A confirmation displays when they successfully update their information.

The following slide shows additional screenshots associated with updating Professional Information.
Change Current Employment Status

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.
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.
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.

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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]
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.
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.
Their updated memberships details display via the Membership tile.
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.
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.
A confirmation message displays, and the Professional Leave status displays in the membership details.
RETURN FROM PROFESSIONAL LEAVE
They can return from professional leave by clicking “Change Status.”
They can easily resume full membership by clicking the checkbox. The confirmation message display below.

Return from Professional Leave

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
Their updated membership status displays in their membership details. "Regular Member" now displays instead of "Professional Leave."
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.
They confirm their information prior to placing the order. Once they place their order, the Order Confirmation page displays.
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.
The system generates the invoice.

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