

CFA Membership

CFA 멤버십

갱신 절차 안내



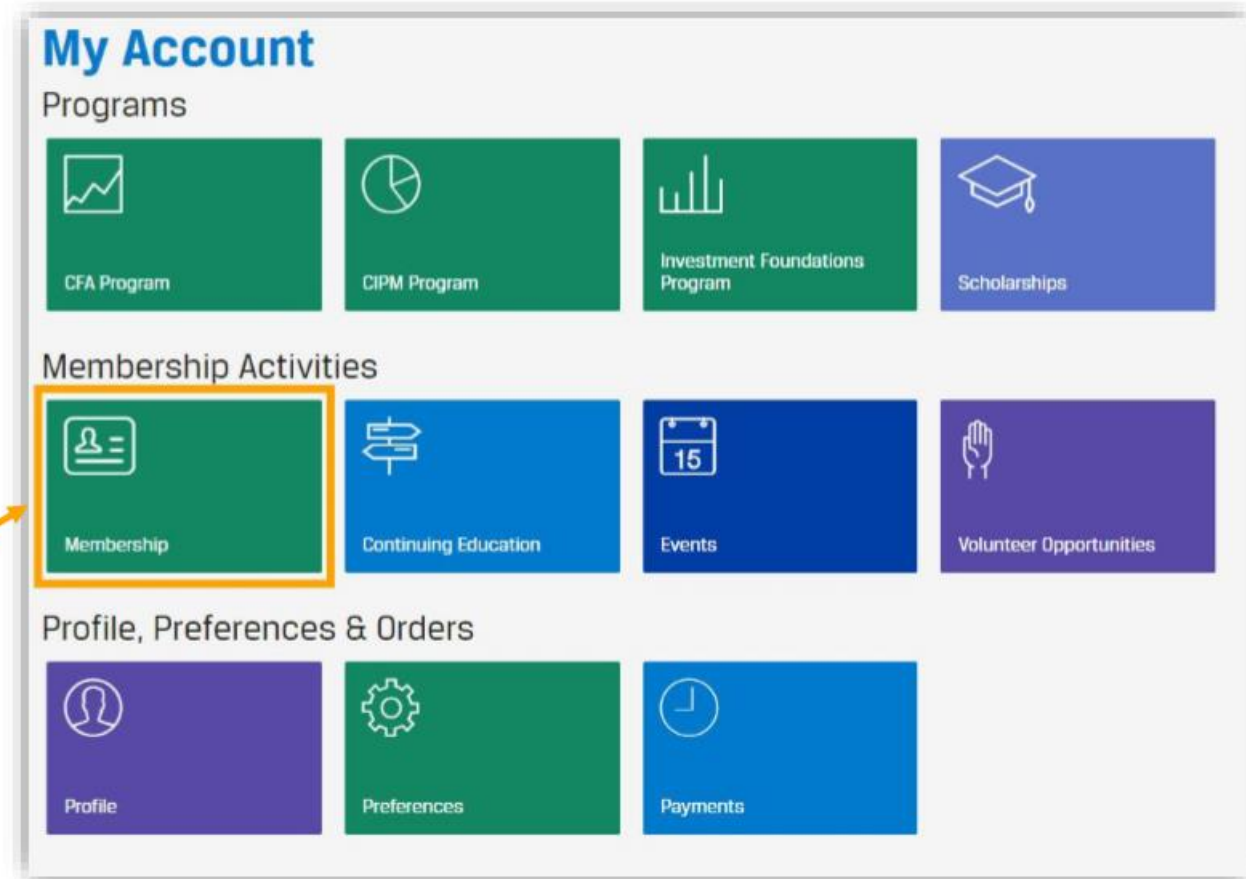
Members renew their membership via the Membership Tile. They access it in one of two ways:

1. They receive an email and click on the link to renew their membership.
2. They log into cfainstitute.org and access “My Account” as seen here.

화살표와 같이 Membership 타일(항목)을 클릭하여 Membership을 갱신할 수 있습니다.

Membership 타일(항목)에 접속하는 경로는 아래와 같습니다.

1. <https://info.cfainstitute.org/apacrenew.html>
2. <https://www.cfainstitute.org/> 사이트에 접속하여 로그인 후 “My Account” 클릭



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

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

오른편 스크린샷을 보면, 2018년 6월 30일 기준으로 멤버십이 만료된다는 메시지를 볼 수 있습니다.

- 본 페이지는 CFA Institute와 Society 멤버십의 중요성이 설명되어 있습니다.
- 아래 부분은 현재 혹은 가장 최근까지의 멤버십 보유 현황을 알려줍니다.

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 Toronto

[Renew Now](#)

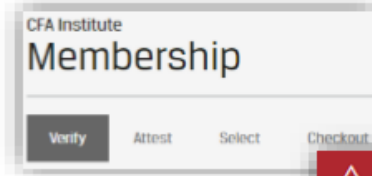
CFA Institute

Expired
30 June 2018
Regular Member

CFA Society Membership(s)

CFA Society Toronto
Expired
30 June 2018
Regular Member

개인 정보 및 직업 정보 확인



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

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

In the first step of the renewal process, they **verify** their personal and professional information. They also complete their Continuing Education (CE) attestation.

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

Renewal의 첫 번째 단계로 개인 정보 및 직업 정보를 정확하게 기입하고 확인해 주어야 합니다. 또한 Continuing Education (CE) 증명을 완료해야 합니다.

- 필요한 모든 정보를 입력하지 않으시면 다음 단계로 넘어가실 수 없습니다.
 - CE 증명 관련 항목은 선택이 가능합니다.
- 모든 정보 기입 및 항목 선택 후 “Save and continue” 버튼을 눌러주세요.

Please review the information below and make any necessary edits.

Personal Information Edit Mailing Address Austin Benjamin CIBC WOOD GUNDY 915 E. High Street KINGSTON, Ontario K7K 6Y3 Canada Phone Canada+16135397903 Secondary Email none provided	Professional Information Edit Employment Status Employed Employer / Firm Name CIBC World Markets Inc Employer Type none provided Occupation Financial Adviser/Planner/Wealth Manager Job Title Investment Advisor Assistant
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☐ I confirm that the above information is accurate and correct. *

Continuing Education

The CFA Institute Code of Ethics requires members to "maintain and improve their professional competence."

If you completed a minimum of 20 hours of continuing education (CE) activities in calendar year 2017, either with CFA Institute content or external content, including at least 2 hours in the areas of Standards, Ethics, and Regulations (SER), you are encouraged to record your achievement. *

☐ Yes, I have completed the minimum recommended CE hours (20 CE credits, including 2 SER credits) during the 2017 calendar year.

☐ No, I have not completed the minimum recommended CE hours (20 CE credits, including 2 SER credits) during the 2017 calendar year.

[Save and Continue](#)

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”

필수 항목을 모두 기입하지 않으면 “Save and continue”로 넘어갈 수 없습니다.

*Primary Phone Number 입력시 국가번호와 지역번호를 선택 후 전화번호를 입력해 주세요.

Please review the information below and make any necessary edits.

Personal Information

Name
Kasi Starnes

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

Business / Building Name
12 STANHOPE RD

Address Line 1 *
915 E. High Street

Address Line 2

City *
SYDNEY

State / Province
NSW

Postal Code *
2071

Primary Phone Number
Country / Region Code: Phone Number:

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](#)

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.

직업 정보는 이곳에서 업데이트 하실 수 있습니다. 필수 항목을 모두 기입하지 않으면 “Save and Continue”을 누르실 수 없고 에러 메시지가 나옵니다.

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

CFA Institute
Membership

Verify **Attest** Select Checkout

In the second step, they complete the Professional Conduct Statement (PCS).

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

Save and Continue

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

두 번째 단계로 Professional Conduct Statement (PCS)를 완료해야 합니다. 각 질문 별 해당되는 항목을 선택하세요.

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, applicable law by contacting CFA Institute as described in the "Contact Us" link.
- 5 Subject to the terms and conditions of this Member's Agreement and our Institute hereby grants to You, during the Term of this Member's Agreement, a license to use the CFA designation and related certification marks in connection with the provision of financial analysis services to the public for a one-year term (the "Term"). You hereby explicitly acknowledge and agree to use this designation other than pursuant to the terms of this license.
- 6 Subject to the terms and conditions of this Member's Agreement and our full compliance with all of your obligations as such, CFA Institute hereby grants to You, during the Term of this Member's Agreement, a non-transferable, and non-sublicensable right and license to use the CIPM designation of financial analysis services to the public for a one-year term, entitled, by virtue of having earned this designation, to its use the CIPM designation.
- 7 If you are permitted to use the CFA designation and/or the CIPM designation of that Certification Mark by You, will be in compliance with the Trade Dress Guidelines, which prohibit the use of that Certification Mark in such a way as to be confused with a company logo or placed in such a way that that Certification Mark certifies the company, or otherwise combine the CFA designation and the CIPM designation with a company logo.
- 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](#).

CFA 협회 Membership Agreement 를 읽고 동의하면 작은 박스를 클릭 후 "Save and Continue"로 넘어갑니다.

In the third step, they see their most recent active memberships as well as the total amount due.

Regular members can opt to replace, remove, or add a society here. 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 Toronto \$144.84

[Replace/Remove](#)

[+ Add a new Society](#)

SubTotal **\$419.84**



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 **\$419.84**

[Proceed to Payment](#)

세 번째 단계로, 가장 최근 가입한 멤버십과 결제 금액을 확인할 수 있습니다. Regular 멤버는 Society를 변경, 제거, 추가할 수 있습니다. 추가로 기부금을 내기 원하는 멤버는 기부 금액을 선택하여 결제할 수 있습니다.

In the fourth step, they enter their credit card information.

Optional: They can answer the question about Employer Support.

네 번째 단계로,
결제 카드 정보를 입력하세요. 결제 금액과
가입을 원하는 Society 항목을 확인해 주세요.

회사에서 멤버십 비용 지원을 받는 경우 항목을
체크해주세요.

Membership

Verify Attest Select **Checkout**

Credit Card

Required *

Credit Card Number *

Expiration Date *

Name on Card *

Order Summary

CFA Institute Dues	\$275.00
CFA Society Toronto	\$144.84
SubTotal	\$419.84
Tax	\$0.00
Total	\$419.84

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.

They confirm their information prior to placing the order.

Membership

Verify Attest Select **Checkout**

Payment Type

 – Ending in 1111
Austin Benjamin
Expires 12/2019

Order Summary

CFA Institute Dues	\$275.00
CFA Society Toronto	\$144.84
SubTotal	\$419.84
Tax	\$0.00
Total	\$419.84

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

“Place Order”버튼을 누르기 전에
결제 항목을 확인해 주세요.

They receive an order confirmation.

- Clicking “What’s Next?” takes them to the CFA Institute Member Benefits page.
- They can download their receipt here or from their Payment tile.

Note:

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

There is no longer an invoicing option.

Membership			
Verify	Attest	Select	Checkout
Thank You! Your order number is #S02801007995 You will receive an email confirmation shortly. Please Note: It may take a few minutes to see your updated membership status on your account page. What's Next? Download Receipt			
Order Summary			
CFA Institute Dues		\$275.00	
CFA Society Toronto		\$144.84	
SubTotal		\$419.84	
Tax		\$0.00	
Total		\$419.84	

결제가 되면 주문 확인 메시지를 볼 수 있습니다.

- “What’s Next?”를 누르면 CFA협회 멤버 혜택 페이지로 이동합니다.
- “Download Receipt”를 누르시면 영수증을 다운 받을 수 있습니다.

Membership Tile



Membership

Manage Your Membership

CFA Institute

Expires
30 June 2019

 Regular Member

CFA Society Membership(s)

CFA Society Toronto

Expires
30 June 2019

 Regular Member

+ Add a new Society

↻ Replace a Society

Payments Tile



Payments

CFA Institute
510 East High Street
Charlottesville VA 22902
United States
GST Registration Number: 124134602 RT0001

Customer Contact Information
Austin Benjamin
915 E. High Street
KINGSTON ON K7K 6Y3
Canada

Order Summary

CFA Institute Dues	\$275.00
Year Ending 30 June 2019	
CFA Society Toronto	\$144.84
Year Ending 30 June 2019	
SubTotal	\$419.84
Tax	\$0.00
Total	\$419.84

Receipt

Payment Details

Receipt Number: CS2801007536
Sales Order Number: SO2801007995
Payment Date: 18 March 2019

Payment Method: Visa
Total: \$419.84

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 #SO2801007995	US\$ 419.84	18 March 2019	View receipt

Note: All fees are shown in US Dollars.

Membership Tile(멤버십 타일)을 클릭하여 Society 멤버십이 Renew 되었는지 확인해 주세요. Payments Tile로 가시면 결제 내역을 확인하실 수 있습니다.

CFA Membership

CFA 멤버십 갱신 절차 안내

REGULAR MEMBER – RENEW

Manage Your Membership: My Account – Membership Tile

Members renew their membership via the Membership Tile. They access it in one of two ways:

1. They receive an email and click on the link to renew their membership.
2. They log into cfainstitute.org and access "My Account" as seen here.

하살표와 같이 Membership 타일(항목)을 클릭하여 Membership를 갱신할 수 있습니다.

Membership 타일(항목)에 접속하는 경로는 아래와 같습니다.

1. <https://info.cfainstitute.org/apacrennew.html>
2. <https://www.cfainstitute.org/> 사이트에 접속하여 로그인 후 "My Account" 클릭

Manage Your Membership – Annual Renewal Screen

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

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

오른편 스크린샷을 보면, 2018년 6월 30일 기준으로 멤버십이 만료된다는 메시지를 볼 수 있습니다.

- 본 페이지는 CFA Institute와 Society 멤버십의 중요성이 설명되어 있습니다.
- 아래 부분은 현재 혹은 가장 최근까지의 멤버십 보유 현황을 알려줍니다.

1 Verify – Personal Information and Professional Information | Continuing Education

개인 정보 및 직업 정보 확인

In the first step of the renewal process, they verify their personal and professional information. They also complete their Continuing Education (CE) attestation.

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

Renewal의 첫 번째 단계로 개인 정보 및 직업 정보를 정확하게 기입하고 확인해 주어야 합니다. 또한 Continuing Education (CE) 증명을 완료해야 합니다.

- 필요한 모든 정보를 입력하지 않으면 다음 단계로 넘어갈 수 없습니다.
- CE 증명 관련 항목은 선택이 가능합니다.

모든 정보 기입 및 항목 선택 후 "Save and continue" 버튼을 눌러주세요.

1 Verify – Personal Information

개인 정보 확인/입력

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. Please enter a valid number.

Note: "Primary Phone Number" includes the Country/Region Code, and all non-numerical characters

필수 항목을 모두 기입하지 않으면 "Save and continue"로 넘어갈 수 없습니다. "Primary Phone Number" 입력시 국가번호와 지역번호를 선택 후 전화번호를 입력해 주세요.

1 Verify – Professional Information

직업 정보 확인

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.

직업 정보는 이곳에서 업데이트 하실 수 있습니다. 필수 항목을 모두 기입하지 않으면 "Save and Continue"를 누를 수 없고 예러 메시지가 나옵니다.

2 Attest – CFA Institute Professional Conduct Statement

증명 – CFA 협회 Professional Conduct 선언

In the second step, they complete the Professional Conduct Statement (PCS).

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

두 번째 단계로 Professional Conduct Statement (PCS)를 완료해야 합니다. 각 질문 별 해당하는 항목을 선택하세요.

2 Attest – CFA Institute Membership Agreement

증명 – CFA 협회 Membership Agreement

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 협회 Membership Agreement를 읽고 동의하면 작은 박스를 클릭 후 "Save and Continue"로 넘어갑니다.

3 Select – View Membership(s) and Amount Due

선택 – 멤버십 선택 및 결제 금액

In the third step, they see their most recent active memberships as well as the total amount due. Regular members can opt to replace, remove, or add a society here. 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]

세 번째 단계로, 가장 최근 가입한 멤버십과 결제 금액을 확인할 수 있습니다. Regular 멤버는 Society를 변경, 제거, 추가할 수 있습니다. 추가로 기부금을 내기 원하는 멤버는 기부 금액을 선택하여 결제할 수 있습니다.

In the fourth step, they enter their credit card information.

Optional: They can answer the question about Employer Support.

네 번째 단계로, 결제 카드 정보를 입력하세요. 결제 금액과 가입을 원하는 Society 항목을 확인해 주세요.

회사에서 멤버십 비용 지원을 받는 경우 항목을 체크해주세요.

The screenshot shows the 'Membership' checkout page. It has tabs for 'Verify', 'Attest', 'Select', and 'Checkout'. The 'Checkout' tab is active. The 'Credit Card' section includes fields for 'Credit Card Number', 'Expiration Date', and 'Name on Card'. The 'Order Summary' on the right lists 'CFA Institute Dues' (\$275.00), 'CFA Society Toronto' (\$144.84), 'SubTotal' (\$419.84), 'Tax' (\$0.00), and 'Total' (\$419.84). There is an 'Employer Support' section with a question 'My employer reimburses me for part or all of this payment.' and a 'Why We Ask' note. At the bottom are 'Back' and 'Continue' buttons.

They confirm their information prior to placing the order.

The screenshot shows the 'Membership' checkout page with the 'Payment Type' section. It displays a 'VISA' card ending in 1111, owned by Austin Benjamin, expiring 02/2019. The 'Order Summary' on the right is identical to the previous step. At the bottom are 'Back' and 'Place Order' buttons.

"Place Order" 버튼을 누르기 전에 결제 항목을 확인해 주세요.

They receive an order confirmation.

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

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

There is no longer an invoicing option.

The screenshot shows the 'Membership' order confirmation page. It has tabs for 'Verify', 'Attest', 'Select', and 'Checkout'. The 'Checkout' tab is active. It includes a 'Thank You' message, a 'What's Next?' button, a 'Download Receipt' button, and an 'Order Summary' on the right. The summary lists 'CFA Institute Dues' (\$275.00), 'CFA Society Toronto' (\$144.84), 'SubTotal' (\$419.84), 'Tax' (\$0.00), and 'Total' (\$419.84).

결제가 되면 주문 확인 메시지를 볼 수 있습니다.

- "What's Next?"를 누르면 CFA협회 멤버 혜택 페이지로 이동합니다.
- "Download Receipt"를 누르시면 영수증을 다운 받을 수 있습니다.

The screenshot shows the 'My Account' page with three main sections: 'Membership Tile', 'Payments Tile', and 'Payment History'. The 'Membership Tile' shows 'CFA Institute' and 'CFA Society Membership(s)'. The 'Payments Tile' shows a 'Receipt' for a payment of \$419.84 on 18 March 2019. The 'Payment History' table lists the same transaction. A note at the bottom states: 'Note: All fees are shown in US Dollars.'

Membership Tile(멤버십 타일)을 클릭하여 Society 멤버십이 Renew 되었는지 확인해 주세요. Payments Tile로 가시면 결제 내역을 확인하실 수 있습니다.

This is a duplicate of the previous screenshot, showing the 'My Account' page with 'Membership Tile', 'Payments Tile', and 'Payment History' sections. It includes the same data and the note: 'Note: All fees are shown in US Dollars.'

Membership Tile(멤버십 타일)을 클릭하여 Society 멤버십이 Renew 되었는지 확인해 주세요. Payments Tile로 가시면 결제 내역을 확인하실 수 있습니다.

CFA

Membership

CFA 멤버십 갱신 절차 안내

자세히 보기

1

Manage Your Membership: My Account - Membership Title 멤버십 관리 화면 (내 계정)

Members renew their membership via the Membership Title. They access it in one of two ways:

1. They receive an email and click on the link to renew their membership.
2. They log into cfa institute.org and access "My Account" as seen here.

회신료와 같이 Membership 타이틀(항목)을 클릭하여 Membership를 갱신할 수 있습니다.

Membership 타이틀(항목)에 접속하는 방법은 아래와 같습니다.

1. <https://info.cfainstitute.org/spacenews.html>
2. <https://www.cfainstitute.org/> 사이트에서 접속하여 로그인 후 "My Account" 클릭

2

Manage Your Membership - Annual Renewal Screen 멤버십 관리 화면 - 연간 멤버십 갱신 화면

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

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

오른편 소규모인원을 보면, 2018년 6월 30일 기준으로 멤버십이 만료된다는 메시지를 볼 수 있습니다.

- 본 메시지는 CFA Institute와 Society 멤버십의 중요성이 설명되어 있습니다.
- 아래 부분을 현재 혹은 가장 최근까지의 멤버십 모두 현황을 알려줍니다.

3

Verify - Personal Information and Professional Information | Continuing Education 개인 정보 및 직업 정보 확인

In the first step of the renewal process, they verify their personal and professional information. They also complete their Continuing Education (CE) attestation.

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

Renewal의 첫 단계로 개인 정보 및 직업 정보를 정확하게 기입하고 확인해 주어야 합니다. 또한 Continuing Education (CE) 증명서를 완성해야 합니다.

- 필요한 모든 정보를 입력하지 않으면 다음 단계로 넘어갈 수 없습니다.
- CE 증명 관련 항목은 선택이 가능합니다. 모든 정보 기입 및 항목 선택 후 "Save and continue" 버튼을 눌러주세요.

4

Verify - Personal Information 개인 정보 확인/입력

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.

필수 항목을 모두 기입하지 않으면 "Save and continue"로 넘어갈 수 없습니다. "Primary Phone Number" 입력시 국가번호와 지역번호를 선택 후 전화번호를 입력해 주어야.

5

Verify - Professional Information 직업 정보 확인

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.

직업 정보는 아래에서 업데이트하실 수 있습니다. 필수 항목을 모두 기입하지 않으면 "Save and Continue"를 누를 수 없고 메시지가 나옵니다.

6

Test - CFA Institute Professional Conduct Statement 증명 - CFA 협회 Professional Conduct 선언

In the second step, they complete the Professional Conduct Statement (PCS).

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

두 번째 단계로 Professional Conduct Statement (PCS)를 완료해야 합니다. 각 질문 별 해당하는 항목을 선택하세요.

7

CFA Institute Membership Agreement 증명 - CFA 협회 Membership Agreement

They then complete the CFA Institute Membership Agreement.

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

CFA 협회 Membership Agreement를 읽고 동의하면 작은 텍스트를 클릭 후 "Save and Continue"로 넘어갑니다.

8

View Memberships and Amount Due 선택 - 멤버십 선택 및 결제 금액

They see their most recent active memberships as well as the total amount due.

Regular members can opt to replace, remove, or add a society here. 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)

세 번째 단계로, 가장 최근 기입한 멤버십과 결제 금액을 확인할 수 있습니다. Regular 멤버는 Society를 변경, 제거, 추가할 수 있습니다. 추가로 기부금을 내기 원하는 멤버는 기부 금액을 선택하여 결제할 수 있습니다.

9

Checkout - including Employer Support 결제 - 고용원에 의한 지원 여부

In the fourth step, they enter their credit card information.

Optional: They can answer the question about Employer Support.

네 번째 단계로, 결제 카드 정보를 입력하세요. 결제 금액과 기입을 원하는 Society 항목을 확인해 주세요.

회사에서 멤버십 지원 비용을 받는 경우 항목을 체크해주세요.

10

Place Order 결제

They confirm their information prior to placing the order.

결제 금액과 기입을 원하는 Society 항목을 확인해 주세요.

"Place Order" 버튼을 누르면 결제 금액을 확인해 주세요.

11

Checkout - Order Confirmation 결제 - 주문 확인

They receive an order confirmation.

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

Note: It may take a few minutes for their information to update on the Membership Title.

There is no longer an invoicing option.

결제기 되면 주문 확인 메시지를 볼 수 있습니다.

- "What's Next?"를 누르면 CFA협회 멤버 혜택 페이지로 이동합니다.
- "Download Receipt"를 누르면 영수증을 다운로드할 수 있습니다.

12

Account - Membership Title | Payments Tile | Receipt 내 계정 - 멤버십 타이틀, 결제 타이틀, 영수증

Membership Title(멤버십 타이틀)을 클릭하여 Society 멤버십이 Renew 되었는지 확인할 수 있습니다. Payments Tile로 가시면 결제 내역을 확인할 수 있습니다.

1

Manage Your Membership: My Account – Membership Title **멤버십 관리 화면 (내 계정)**

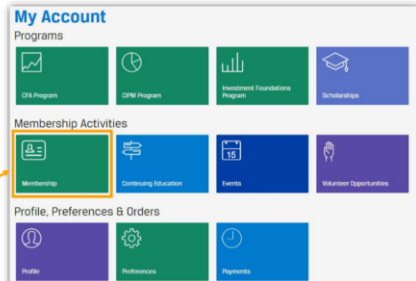
Members renew their membership via the Membership Title. They access it in one of two ways:

1. They receive an email and click on the link to renew their membership.
2. They log into cfainstitute.org and access "My Account" as seen here.

화살표와 같이 **Membership** 타일(항목)을 클릭하여 **Membership**을 갱신할 수 있습니다.

Membership 타일(항목)에 접속하는 경로는 아래와 같습니다.

1. <https://info.cfainstitute.org/apacarenew.html>
2. <https://www.cfainstitute.org/> 사이트에서 접속하여 로그인 후 "My Account" 클릭



2

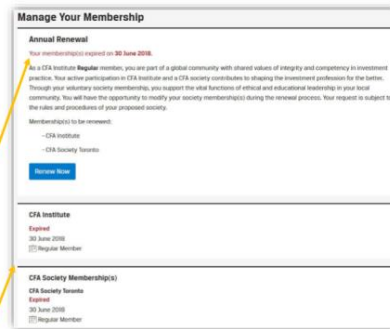
Manage Your Membership – Annual Renewal Screen **멤버십 관리 화면 – 연간 멤버십 갱신 화면**

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

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

오른편 스크린샷을 보면, 2018년 6월 30일 기준으로 멤버십이 만료된다는 메시지를 볼 수 있습니다.

- 본 페이지는 CFA Institute와 Society 멤버십의 중요성이 설명되어 있습니다.
- 아래 부분은 현재 혹은 가장 최근까지의 멤버십 보유 현황을 알려줍니다.

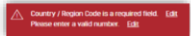


4

Verify – Personal Information **개인 정보 확인/입력**

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

필수 항목을 모두 기입하지 않으면 "Save and continue"로 넘어갈 수 없습니다. "Primary Phone Number" 입력시 국가번호와 지역번호를 선택 후 전화번호를 입력해 주세요.

7

CFA Institute Membership Agreement **증명 – CFA 협회 Membership Agreement**

They then complete the CFA Institute Membership Agreement.

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

CFA 협회 Membership Agreement를 읽고 동의하면 작은 박스를 클릭 후 "Save and Continue"로 넘어갑니다.

8

View Membership(s) and Amount Due **선택 – 멤버십 선택 및 결제 금액**

Next, they see their most recent active memberships as well as the total amount due. Regular members can opt to replace, remove, or add a society here. 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]

세 번째 단계로, 가장 최근 가입한 멤버십과 결제 금액을 확인할 수 있습니다. Regular 멤버는 Society를 변경, 제거, 추가할 수 있습니다. 추가로 기부금을 내기 원하는 멤버는 기부 금액을 선택하여 결제할 수 있습니다.

3

Verify – Personal Information and Professional Information | Continuing Education

개인 정보 및 직업 정보 확인

In the first step of the renewal process, they verify their personal and professional information. They also complete their Continuing Education (CE) attestation.

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

Renewal의 첫 번째 단계로 개인 정보 및 직업 정보를 정확하게 기입하고 확인해 주어야 합니다. 또한 Continuing Education (CE) 증명을 완료해야 합니다.

- 필요한 모든 정보를 입력하지 않으면 다음 단계로 넘어갈 수 없습니다.
- CE 증명 관련 항목은 선택이 가능합니다.

모든 정보 기입 및 항목 선택 후 "Save and continue" 버튼을 눌러주세요.

6

Test – CFA Institute Professional Conduct Statement **증명 – CFA 협회 Professional Conduct 선언**

In the second step, they complete the Professional Conduct Statement (PCS).

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

두 번째 단계로 Professional Conduct Statement (PCS)를 완료해야 합니다. 각 질문 별 해당되는 항목을 선택하세요.

9

Checkout – including Employer Support

결제 – 고용인에 의한 지원 여부

In the fourth step, they enter their credit card information.

Optional: They can answer the question about Employer Support.

네 번째 단계로, 결제 카드 정보를 입력하세요. 결제 금액과 가입을 원하는 Society 항목을 확인해 주세요.

회사에서 멤버십 비용을 지원하는 경우 항목을 체크해주세요.

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 policy and trademark guidelines.

CFA 협회 Membership Agreement 를 읽고 동의하면 작은 박스를 클릭 후 "Save and Continue"로 넘어갑니다.

In the third step, they see their most recent active memberships as well as the total amount due.

Regular members can opt to replace, remove, or add a society here. 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]

세 번째 단계로, 가장 최근 가입한 멤버십과 결제 금액을 확인할 수 있습니다. Regular 멤버는 society를 변경, 제거, 추가할 수 있습니다. 추가로 기부금을 내기 원하는 멤버는 기부 금액을 선택하여 결제할 수 있습니다.

In the fourth step, they enter their credit card information.

Optional: They can answer the question about Employer Support.

네 번째 단계로, 결제 카드 정보를 입력하세요. 결제 금액과 가입을 원하는 Society 항목을 확인해 주세요.

회사에서 멤버십 비용 지원을 받는 경우 항목을 체크해주세요.

They confirm their information prior to placing the order.

"Place Order"버튼을 누르기 전에 결제 항목을 확인해 주세요.

They receive an order confirmation.

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

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

There is no longer an invoicing option.

결제가 되면 주문 확인 메시지를 볼 수 있습니다.

- "What's Next?"를 누르면 CFA협회 멤버 혜택 페이지로 이동합니다.
- "Download Receipt"를 누르면 영수증을 다른 방법도 가능합니다.

Note: All fees are shown in US Dollars.

Membership Tile(멤버십 타일)을 클릭하여 Society 멤버십이 Renew 되었는지 확인해 주세요. Payments Tile로 가시면 결제 내역을 확인하실 수 있습니다.

2020 CFA Membership 회비 납부 절차 안내

1

Manage Your Membership: My Account – Membership Tile **멤버십 관리 화면 (내 계정)**

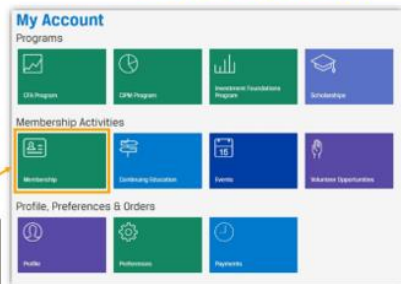
Members renew their membership via the Membership Tile. They access it in one of two ways:

1. They receive an email and click on the link to renew their membership.
2. They log into cfa-institute.org and access "My Account" as seen here.

화살표와 같이 Membership 타일(항목)을 클릭하여 Membership를 갱신할 수 있습니다.

Membership 타일(항목)에 접속하는 경로는 아래와 같습니다.

1. <https://info.cfa-institute.org/apac-renew.html>
2. <https://www.cfa-institute.org/> 사이트에 접속하여 로그인 후 "My Account" 클릭



2

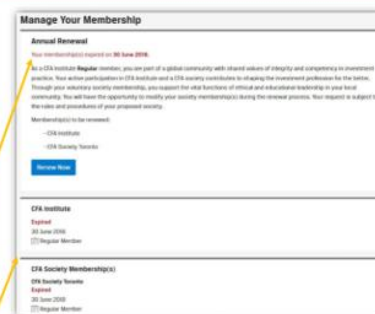
Manage Your Membership – Annual Renewal Screen **멤버십 관리 화면 – 연간 멤버십 갱신 화면**

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

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

오른쪽 스크린샷을 보면, 2018년 6월 30일 기준으로 멤버십이 만료된다는 메시지를 볼 수 있습니다.

- 본 페이지는 CFA Institute와 Society 멤버십의 중요성이 설명되어 있습니다.
- 아래 부분은 현재 혹은 가장 최근까지의 멤버십 보유 현황을 알려줍니다.



3

1 Verify – Personal Information and Professional Information | Continuing Education **개인 정보 및 직업 정보 확인**

In the first step of the renewal process, they verify their personal and professional information. They also complete their Continuing Education (CE) attestation.

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

Renewal의 첫 번째 단계로 개인 정보 및 직업 정보를 정확하게 기입하고 확인해 주어야 합니다. 또한 Continuing Education (CE) 증명서를 완료해야 합니다.

- 필요한 모든 정보를 입력하지 않으면 단계로 넘어갈 수 없습니다.
- CE 증명 관련 항목은 선택이 가능합니다. 모든 정보 기입 및 항목 선택 후 "Save and continue" 버튼을 눌러주세요.



4

Verify – Personal Information **개인 정보 확인/입력**

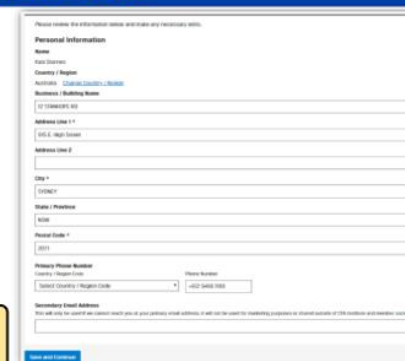
If they need to update their personal information, they do so here.

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. Please enter a valid number.

Note: "Primary Phone Number" includes the Country/Region Code, and all non-numerical characters

필수 항목을 모두 기입하지 않으면 "Save and continue"로 넘어갈 수 없습니다. *Primary Phone Number 입력시 국가번호와 지역번호를 선택 후 전화번호를 입력해 주세요.



5

Verify – Professional Information **직업 정보 확인**

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

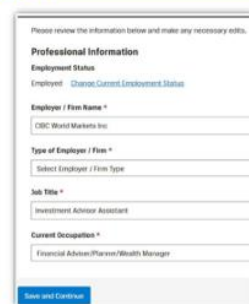
Should they "save and continue" without completing all of the required fields, an error message displays, and they cannot leave this page until they provide the missing information.

Field of Expertise / Practice is a required field.

A confirmation displays when they successfully update their information.

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

직업 정보는 이곳에서 업데이트 하실 수 있습니다. 필수 항목을 모두 기입하지 않으면 "Save and continue"를 누르실 수 없고 여러 메시지가 나옵니다.



6

Attest – CFA Institute Professional Conduct Statement **증명 – CFA 협회 Professional Conduct 선언**

In the second step, they complete the Professional Conduct Statement (PCS).

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

두 번째 단계로 Professional Conduct Statement (PCS)를 완료해야 합니다. 각 질문 별 해당하는 항목을 선택하세요.



Please select the appropriate response. Please provide 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.