CFA Membership

CFA 맴버쉽

갱신 절차 안내



Manage Your Membership: My Account – Membership Tile 맴버쉽 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.
- 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. <u>https://info.cfainstitute.org/apacrenew.html</u>
- 2. <u>https://www.cfainstitute.org/</u> 사이트에 접속하 여 로그인 후 "My Account" 클릭



Manage Your Membership – Annual Renewal Screen 맴버쉽 관리 화면 – 연간 맴버쉽 갱신 화면

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

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 ٠ the importance of CFA Institute and society membership.
- The bottom portion of the screen displays ٠ the person's most recent memberships.

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

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

Verify – Personal Information and Professional Information | Continuing Education



개인 정보 및 직업 정보 확인

We are missing some details in your Personal Information. <u>Complete Personal Information</u>

We are missing some details in your Professional Information. <u>Complete Professional Information</u>

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 눌러 주세요.

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

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 Continu

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. Edit Please enter a valid number. Edit

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 지역번 호를 선택 후 전화번호를 입력해 주세요.

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Vilmary Phone Number ountry / Region Code Phone Number
ountry / Region Code Phone Number
Select Country / Region Code * +612 9418 1190
econdary Email Address his 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.
e and Continue

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

Verify – Professional Information

직업 정보 확인

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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.

Type of Employer / Firm is a required field. Edit

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

직업 정보는 이곳에서 업데이트 하실 수 있습니다. 필수 항목 을 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 Dob Title * Investment Advisor Assistant Current Occupation * Financial Adviser/Planner/Wealth Manager		
Professional Information Employment Status Employed Change Current Employment Status Employer / Firm Name * CIBC World Markets Inc CIBC World Markets Inc Type of Employer / Firm * Select Employer / Firm Type Tob Title * Investment Advisor Assistant Current Occupation * Financial Adviser/Planner/Wealth Manager	Please revi	ew the information below and make any necessary edits.
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Current Occupation * Financial Adviser/Planner/Wealth Manager	Investmer	nt Advisor Assistant
Financial Adviser/Planner/Wealth Manager	Current Oc	cupation *
	Financial	Adviser/Planner/Wealth Manager
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Membership	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.
Verity Attest Select Checkout	I certify that my answers below are accurate, truthful, and complete. Talso agree to notify CFA Institute promptly of any changes that would require a different response to any of the following questions: *
	 Have you ever been the subject of any written complaint or accusation regarding your professional conduct or activities? * No Yes
In the second step, they	 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 No
complete the Professional Conduct Statement (PCS).	Res 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
Note: For each "Yes," they must provide the matter's Current Status. There is an optional text box to provide additional	 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
Information as well.	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
번째 단계로 Professional Conduct St	atement (PCS)를 nvicted of, or pleaded guility to, any crime (regardless of whether it involved your professional conduct or activities) that could have resulted in a
료해야 합니다. 각 질문 별 해당되는 항	목을 선택하세요.



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.

Individ	nstitute Membership Agreement ual members of CFA institute must read and agree to the following:		
1	You have read, understand, and agree to comply with the CFA Institute Cod Procedure for Professional Conduct ("Governing Documents") and other rul time.	of Ethics, Standards of Professional Conduct, Bylaws, and Rules of s and regulations established by CFA Institute as amended from time to	
2	You acknowledge and understand that failure to comply with the Governin failure to cooperate with any CFA Institute investigation of Your conduct is	Documents is grounds for disciplinary action against You and that a rounds for summary suspension.	
3	You hereby acknowledge that the information provided in this Membership	lenewal is true, correct, and complete in all respects.	
4	You acknowledge, agree, and, where necessary, consent to the processing understand that You may request access and the opportunity to modify.~ applicable law by contacting CFA institute as described in the "Contact U	of Your personal data as described in the CFA Institute Privacy Policy. You	he
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 license to use the CFA designation and related certification marks in con one-year term (the "Term"). You hereby explicitly acknowledge and agree use this designation other than pursuant to the terms of this license.	 registrations and applications therefor. CFA Institute may, in its sole discretion, maintain or discontinue the maintenance of such applications in registrations for the Certification Marks at any time. 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 Marks and all rights therein and goodwill pertaining thereto solely and exclusively below. 	and Mark, g to
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 non-transferable, and non-sublicensable right and license to use the CIP provision 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 of	10 You acknowledge the importance to CFA institute of its reputation and goodwill and to the public of maintaining high, uniform standards of quality of these services provided under the Certification Marks. The validity of the standards of quality exercises provided under the Certification Marks. You agree that CFA institute will have the right, but not the obligation, to monitor the provides provided by You in association with the Certification Marks and that, in the event CFA institute determines that the quality of those services provided by You in association with the Certification Marks and that, in the event CFA institute determines that the quality of those services not meet the standards set by CFA institute, including the standards in the Governing Documents, CFA Institute may terminate the license.	ers Jity in sion of evices e upon
7	If you are permitted to use the CFA designation and/or the CIPM designat use of that Certification Mark by You, will be in compliance with the Trade in such a way as to be confused with a company logo or placed in such that that Certification Mark certifies the company, or otherwise combine	prior notice. You acknowledge and agree that the final determination with respect to the termination of this license shall be made by CFA instit Upon termination of this license for any reason whatsoever, You agree to immediately cease any and all use or display of all Certification Marks any purpose whatsoever. In the event that this license terminates in accordance with the terms of this Member's Agreement, You will not be er to any refund of any fees already paid or owing as of the date of termination.	ute. : for ntitled

CFA 협회 Membership Agreement 작은 박스를 클릭 후 "Save and Continue"로 넘어갑니다. Select – View Membership(s) and Amount Due

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]

ip(s) and Amount Due 선택 – 멤버쉽 선택 및 결제 금액 Membership



세 번째 단계로, 가장 최근 가입한 멤버쉽과 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_

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 멤버쉽 비용 지원을 받는 경우 항목을 체크해주세요.



They confirm their information prior to placing the order.

4



Checkout – Place Order

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 Tile.

There is no longer an invoicing option.



My Account – Membership Tile | Payments Tile | Receipt 내계정 – 멤버쉽 타일, 결제 타일, 영수증



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

		Manage Your Membership: My Accou	nt-Membership Tile 맴버쉽 관리 화면 (내 계정)	Manage Your Membership – Annual Renewal Scree	 매버쉽 관리 화면 – 연간 매버쉽 갱신 화면
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2 Attest - CFA Institute Profess Membership	sional Conduct Statement 중명 – CFA 협회 Professional Conduct 선언 bt Conduct Statement S 등명 – CFA 협회 Professional Conduct 선언 bt Conduct Statement S = Statement	2 Attest - CFA Institute Membership Agreement Provide Statute Contract Statute Attest - CFA Institute Membership Agreement Contract Statute Attest - CFA Institute Membership Agreement Contract Statute Attest - CFA Institute Membership Agreement Contract Statute Attest - CFA Institute Membership Agreement is main bigst in depth to core our gridelines Contract Statute Attest - CFA Institute Agreement is main bigst in depth to core our gridelines Contract Statute Attest - CFA Institute Agreement is main bigst in depth to core our gridelines Contract Statute Attest - CFA Institute Agreement is main bigst in depth to core our gridelines Contract Statute Attest - CFA Institute Agreement is Statute Contract Statute Attest - CFA Institute Agreement is Statute Contract Statute Attest - CFA Institute Agreement is Statute Contract Statute Attest - CFA Institute Agreement is Statute Contract Statute Attest - CFA Institute Agreement is Statute Contract Statute	Action Action Image: Ima	A select – View Membership(s) and Amount Due 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. Note: Some societies only accept CFA charterholders for regular membership: affiliate members must hava any not be an option in all societies. When making a donation to the CFA Institute Research Foundation, members are asked. Tow should we identify you? ²¹ . Show my Mame 2. Show my Mame 3. Show my Mame 3. Show ne Membership: 3. Show ne Membership: 3. Show ne Membership: 3. Show my Mame 3. Show ne Membership: 3. Show my Mame 3. Show my	선택 – 멤버쉽 선택 및 결제 금액 heritext \$775.00 \$419.84

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

4 Checkout – including Employer Support

결제 – 고용인에 의한 지원 여부

	Membership			
	Verly Atlest Sele	Checkout		
	Credit Card		Order Summary	
	Request * Draft Card Rambel *		PEA Institute Duran	1275.00
			CFA Society Toronto	\$144,84
	Espiration Date *		Sub?otal	\$415.84
the fourth step, they enter their	- v - v		Tax	50.00
redit card information.	Name on Card 1		Total	\$419.84
	Auth Bergaren			
ptional: They can answer the uestion about Employer Support.				
	Employer Support			
	My employer reinfources me for part or all	of this payment.		
번째 단계로,	1			
제 카드 정보를 입력하세요. 결제 금액과	Why the Ank We are constantly working to increase an	evenues of the CFA Dramer and support for members from		
입을 원하는 Society 항목을 확인해 주세요.	amplityers in the breastnerst probability in	se response feltes to gade car actions in this area.		
사에서 멤버쉽 비용 지원을 받는 경우 항목을	Eact Continue			
그해주세요				

	Membership		
	Verify Attest Select Checkout		
	Payment Type	Order Summary	
They confirm their	VISA - Ending in 1111	CFA Institute Dues	\$275.00
information prior to	Austin Benjamin Expires 12/2019	CFA Society Toronto	\$144.84
placing the order.		SubTotal	\$419.84
		Tax	\$0.00
		Total	\$419.84
	Back Place Order	r"버튼을 누르기 전에	

 They receive an order confirmation. Clicking "What's Next?" takes them to the CFA Institute Member 	Werify Attest Select Direction		
Benefits page. • They can download their receipt here or from their Payment tile.	Thank You! Two enter methers in \$50250007595 Two enter control confirmation shortly. Fearse Nets. Entrol you are a fermioritise to service updated membership status on your account page.	Order Summary	6275.00
Note: It may take a few minutes for their information to update on the Membership Tile.	What's Next? Download Receipt	CFA Society Toronto SubTotal	\$144.84 \$419.84
There is no longer an invoicing option.		Total	\$419.84
결제가 되면 주 • "What's Ne 이동합니다. • "Download 수 있습니다	문 확인 메시지를 볼 수 있습니다. xtt*을 누르면 CFA협회 멤버 혜택 페이지로 Receipt*를 누르시면 영수증을 다운 받을		

결제 – 주문 확인

(4)

Checkout – Order Confirmation

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CFA

Membership

CFA 맴버쉽

갱신 절차 안내





Nanage Your Membership: My Account - Membership Tile 맴버쉽 관리 화면 (내 계정)

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 They receive an email and click on the link to renew their membership. 	<u>&:</u>	皋	15	R
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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.	that bagban methody, you are get of a galar community with there is not and of a reacting vari- tion of the participation of the third structures of the structures of the third the there is a diverse system) method with the structure of the structure of the structure of the and the structure of the structure of the structure of the structure of the and the structure of the structure of the structure of the structure of the and the structure of the structure of the structure of the structure of the and the structure of the str
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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]	• 50 • 510 • 525 • 500 • 5100 • 5250 Total \$419,84 Proceed to Sequent
세 번째 단계로, 가장 최근 가입한 멤버쉽고 추가로 기부금을 내기 원하는 멤버는 기부	› 결제 금액을 확인할 수 있습니다. Regular 멤버는 Society를 변경, 제거, 추가할 수 있습니다. 금액을 선택하여 결제할 수 있습니다.

을 모두 기입하지 않으면 "Save and Continue"을 누르실 수

없고 에러 메시지가 나옵니다.

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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]	 ○ 50 ○ 510 ○ 525 ○ 550 ○ 5100 ○ 5250 Total Availab Payment 	\$419.84
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2020 CFA Membership 회비 납부 절차 안내

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