

# Activating Your Society Memberships

Step 1:

The screenshot shows the CFA Institute website home page. At the top left is the CFA Institute logo. To its right is a search bar with a magnifying glass icon. Below the logo is a navigation menu with links: Home, My CFA, About, Programs, Ethics & Standards, Learning & Events, and Partners. The main content area features a large banner for an "Investment Management Workshop" (8-12 July 2013, Boston, Massachusetts) with an "Apply Today" button. To the right of the banner is a "Member Cfa Sr." menu with options: Manage Account (circled in green), Member Dues, CE Program, Career Resources, Exam Details, and Claritas My CFA. Below this menu is a "Log Out" link. At the bottom of the page, there are three main sections: "Ethics, Standards & Advocacy", "The CFA Program", and "Societies". On the far right, there is a "CFA Institute Members: Cast Your 2013 Proxy" section with the text "Your vote is important. Please cast".

Step 2:

The screenshot shows the "Manage Account" page on the CFA Institute website. The top navigation bar includes "CFA Institute", "Candidate My CFA", "Member My CFA", and "Claritas My CFA". Below this is a sub-navigation bar with "Study Materials" and "Manage Account". The breadcrumb trail reads "Home / Claritas My CFA / Manage Account". The main content area has several tabs: "Profile", "Topics & Interests", "Newsletters & Alerts", "Membership" (selected), "CE Summary", and "Member Directory". Under the "Membership" tab, there is a paragraph: "With your membership, you gain access to powerful tools, information, and educational opportunities available nowhere else. [Learn about your member benefits.](#)" Below this are two columns of membership details. The left column lists: "CFA Institute Member Type" (Regular), "CFA Institute Dues Paid Through" (30 June 2012 [View Receipt](#)), "CFA PCS Filed Calendar Year" (2012 [View PCS History](#)), and "Societies" (CFA Virginia (Dues Paid Through 30 June 2012)). The right column lists: "Membership and Society Applications" ([Manage Applications](#)), "Membership Status" ([Manage Your Status](#)), and "Additional Membership Information" ([Continuing Education \(CE\) Attestation History](#), [Volunteer Interest Profile](#), and [View/Edit Full Membership Information](#) (circled in green)).

Step 3:



Welcome back Cfa Member  
CFA Institute ID: 6496595  
You last logged in 03/28/2013.

Membership

- Manage Member and Society Applications
- View My References
- View My Memberships
- Manage My Memberships
- View Professional Conduct History
- View Continuing Education History



Select the Membership Transaction

- Activate your Membership
- Renew your Membership and Pay your Dues

Return to Account Home

Step 4:



The "back" button on your web browser should not be used during this transaction. Use the links and buttons on each page to navigate through the process.

Review member dues information here:

My Memberships

| Select                              | Name                  | Membership Type | Member Type | Membership Status | Retired | Join Date | Expiration Date |
|-------------------------------------|-----------------------|-----------------|-------------|-------------------|---------|-----------|-----------------|
| <input checked="" type="checkbox"/> | CFA Society Virginia  | Society         | Regular     | Pending           |         |           |                 |
| <input type="checkbox"/>            | CFA Society Baltimore | Society         | Regular     | Pending           |         |           |                 |
| <input type="checkbox"/>            | CFA Society Mexico    | Society         | Regular     | Pending           |         |           |                 |

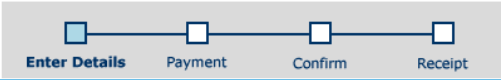
Return to Account Home

Activate

Step 5:



Reports



### Print Invoice

To pay by credit card, click the 'Continue to Checkout' button.

To pay by check, select 'Invoice' in the Reports drop down box above and mail it with your payment to CFA Institute.

[Return to Account Home](#)

[Continue to Checkout](#)

Step 6:



### Shopping Cart

| Item                 | List Price | Offer Code 1         | Offer Code 2         | Net Price | Total  |
|----------------------|------------|----------------------|----------------------|-----------|--------|
| CFA Society Virginia | \$70.00    | <input type="text"/> | <input type="text"/> | \$0.00    | \$0.00 |

[Recalculate](#)

Discount \$0.00  
Total Price \$0.00

Please click the RECALCULATE button to apply offer codes to the net price.

[Empty Cart](#)

[Continue](#)

Step 7:



Shopping Cart

Reports



Order Confirmation

Your order has been received. Thank You! Please print this page for your records and/or print the 'Order Receipt' Report in the Reports dropdown box above.

|                  |              |                         |            |
|------------------|--------------|-------------------------|------------|
| Order #          | 1-1412053775 | Recipient               | Cfa Member |
| Order Date       | 4/1/2013     | CFA Institute ID        | 6496595    |
| Status           | In Progress  |                         |            |
| Purchase Order   |              | <b>Billing Address:</b> |            |
| Credit Card Type |              |                         |            |
| Credit Card #    |              |                         |            |

Order Items

| Line # | Qty | Item                 | List Price | Net Price    | Total  |
|--------|-----|----------------------|------------|--------------|--------|
| 1      | 1   | CFA Society Virginia | \$70.00    | \$0.00       | \$0.00 |
|        |     |                      |            | Discount:    | \$0.00 |
|        |     |                      |            | Net Price:   | \$0.00 |
|        |     |                      |            | Tax:         | \$0.00 |
|        |     |                      |            | Shipping:    | \$0.00 |
|        |     |                      |            | Total Price: | \$0.00 |

Return to Home Page