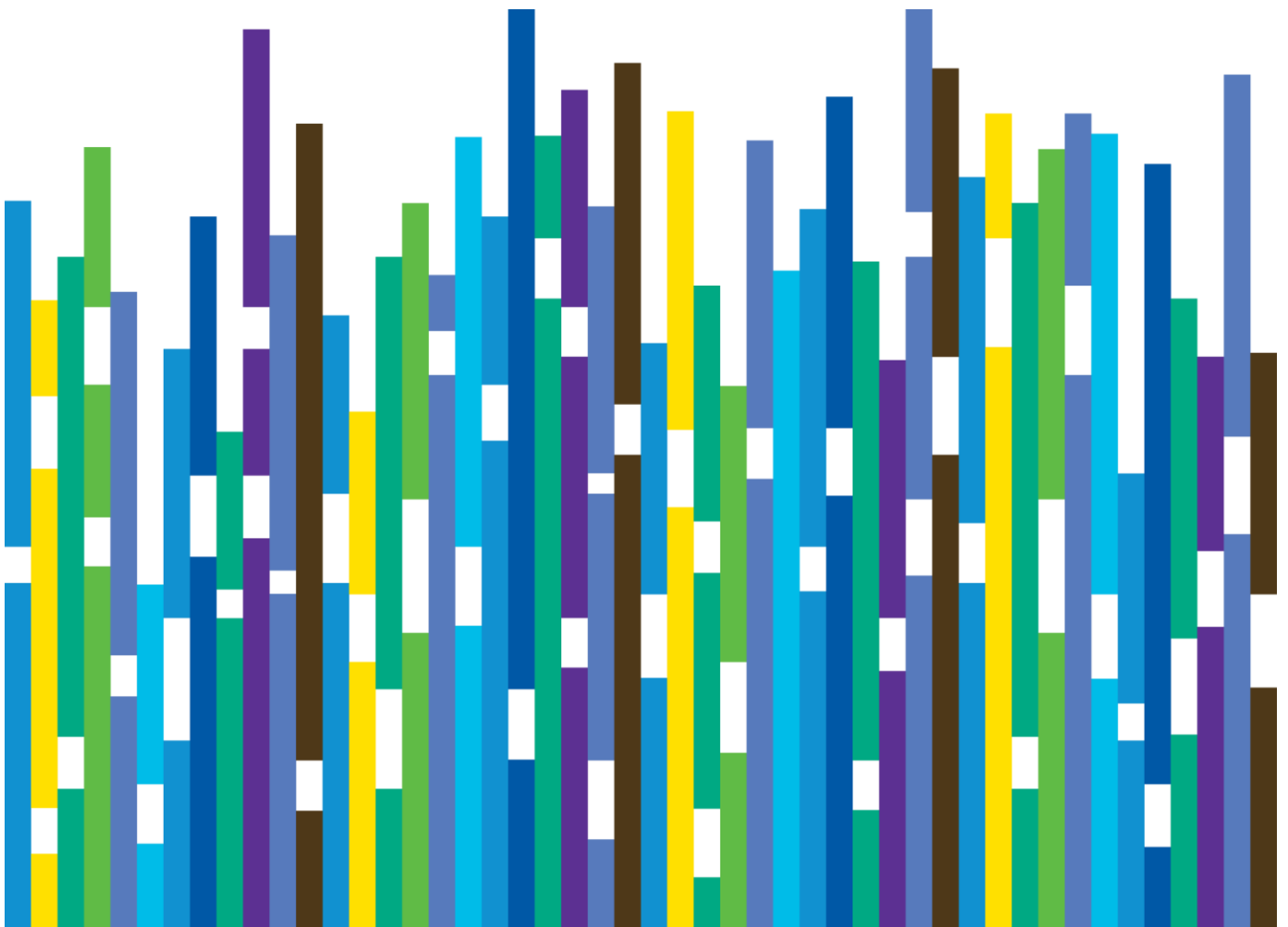
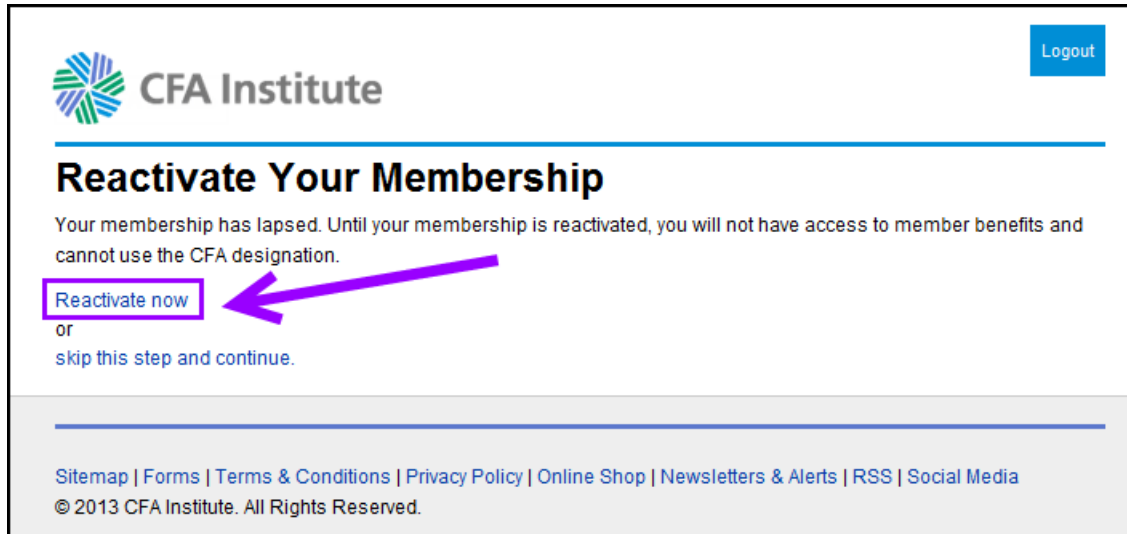



# REACTIVATING YOUR MEMBERSHIP



## External Membership Reactivation Screenshots

1. Log in to [your account](#)
2. Click **Reactivate now** on the Reactivate Your Membership screen

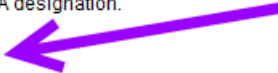


 **CFA Institute** [Logout](#)

---

## Reactivate Your Membership

Your membership has lapsed. Until your membership is reactivated, you will not have access to member benefits and cannot use the CFA designation.

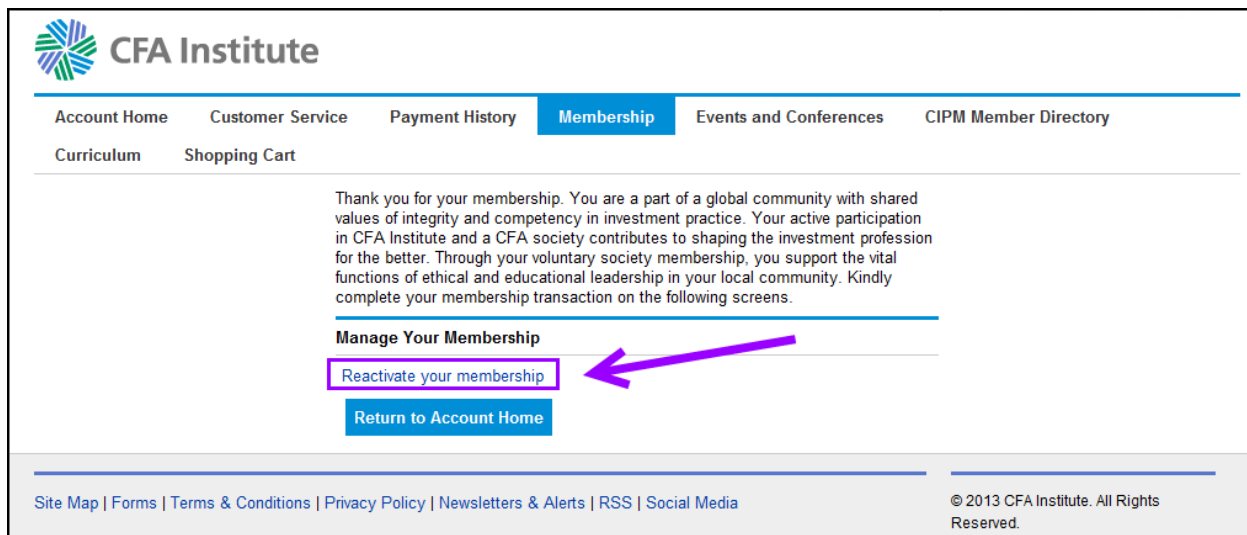
[Reactivate now](#) 


or  
[skip this step and continue.](#)

---

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3. Click **Reactivate your Membership**



 **CFA Institute**

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[Curriculum](#)   [Shopping Cart](#)

Thank you for your membership. You are a 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. Kindly complete your membership transaction on the following screens.

---

**Manage Your Membership**


[Reactivate your membership](#) 

[Return to Account Home](#)

---

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4. Select the membership(s) to reactivate, click **Reactivate**

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[Curriculum](#)   [Shopping Cart](#)

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	Status Reason	Retired	Join Date	Expiration Date
<input checked="" type="checkbox"/>	CFA Society	Society	Regular	Lapsed	Dues and PCS not submitted	N	10/15/2008 08:36:52 AM	6/30/2012 11:59:59 PM
<input checked="" type="checkbox"/>	CFA Institute	CFA	Regular	Lapsed	Dues and PCS not submitted	N	10/15/2008 08:36:56 AM	6/30/2012 11:59:59 PM

[Return to Account Home](#)   [Reactivate](#)

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5. Complete the Professional Conduct Statement, click **Submit**



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[Shopping Cart](#)

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### CFA Institute Membership Professional Conduct Statement

Answer the following questions by marking the appropriate response for each. Any matter described in the questions below must be disclosed, even if the matter is still pending.

- 1 Have you ever been the subject of a written complaint regarding your professional conduct in either a direct or supervisory capacity?  
 No  
 Yes, matter not previously disclosed to CFA Institute  
 Yes, matter currently under investigation by CFA Institute  
 Yes, matter previously investigated by CFA Institute; review concluded
- 2 Have you ever been the subject of, a defendant in, or respondent to any investigation, civil litigation, arbitration, or other action or proceeding in which your professional conduct, in either a direct or supervisory capacity, was at issue?  
 No  
 Yes, matter not previously disclosed to CFA Institute  
 Yes, matter currently under investigation by CFA Institute  
 Yes, matter previously investigated by CFA Institute; review concluded
- 3 Have you ever been temporarily or permanently suspended, barred, banned, or otherwise prevented from: (i) working or participating in the securities industry; (ii) trading on any securities or contract market; (iii) acting as a broker, dealer, investment advisor, or other person required to register under any law or regulation; or (iv) acting as an employee; registered representative; or affiliated person of any entity required to register or be licensed under any law or regulation (i.e., investment company, bank, etc.)?  
 No  
 Yes, matter not previously disclosed to CFA Institute  
 Yes, matter currently under investigation by CFA Institute  
 Yes, matter previously investigated by CFA Institute; review concluded
- 4 Have you ever been found to have aided, abetted, counseled, commanded, induced, or procured the violation of any securities- or commodities-related law, regulation, or rule?  
 No  
 Yes, matter not previously disclosed to CFA Institute  
 Yes, matter currently under investigation by CFA Institute  
 Yes, matter previously investigated by CFA Institute; review concluded
- 5 Have you ever been convicted of or pled guilty to: (i) any crime defined as a felony or punishable by more than one year in prison (regardless of the sentence actually imposed), or (ii) any crime involving moral turpitude (fraud, lying, cheating, stealing, or other dishonest conduct) or any substantially equivalent crime in any court of law?  
 No  
 Yes, matter not previously disclosed to CFA Institute  
 Yes, matter currently under investigation by CFA Institute  
 Yes, matter previously investigated by CFA Institute; review concluded
- 6 The above responses and all information provided by me on this Professional Conduct Statement are truthful, accurate, and complete, and I agree to notify CFA Institute promptly of any material changes required in my responses to the foregoing questions. I acknowledge and understand that failure to comply with the CFA Institute Code of Ethics and Standards of Professional Conduct is grounds for disciplinary action against me and that failure to cooperate with any CFA Institute investigation of my conduct is grounds for summary suspension.  
 Yes
- 7 **MEMBER'S AGREEMENT:** I 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](#) and other rules and regulations established by CFA Institute as amended from time to time.  
 Yes

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6. Click **Yes** or **No** to make a Research Foundation donation

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**Donate to the Research Foundation of CFA Institute**

Please consider donating to the [Research Foundation](#) so they may further their work of providing valuable research for the global investment community.

Yes, I would like to donate.

**Donation Amount (US Dollars):**  
▼

**I would like this donation to be made in the name of (if left blank, donation will be anonymous):**  
Claire Thomas

No, I'm not interested in donating to the Research Foundation of CFA Institute at this time.

[Continue](#)

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a. If **Yes**, select the Donation Amount and enter who you would like the donation to be made in honor of, click **Continue**

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**Donate to the Research Foundation of CFA Institute**

Please consider donating to the [Research Foundation](#) so they may further their work of providing valuable research for the global investment community.

Yes, I would like to donate.

**Donation Amount (US Dollars):**  
▼

**I would like this donation to be made in the name of (if left blank, donation will be anonymous):**

No, I'm not interested in donating to the Research Foundation of CFA Institute at this time.

[Continue](#)

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b. If **No**, click **Continue**

7. Select your payment method – credit card or check
  - a. Click **Continue to Checkout** to pay by credit card (skip to #8), or

The screenshot shows the CFA Institute website's Shopping Cart page. At the top, there is a navigation menu with links for Account Home, Customer Service, Payment History, Membership, Events and Conferences, and CIPM Member Directory. Below this, there are tabs for Curriculum and Shopping Cart. A progress bar indicates the current step: Enter Details (selected), Payment, Confirm, and Receipt. A Reports dropdown menu is visible in the top right. Below the progress bar, there is a section titled "Print Invoice" with instructions: "To pay by credit card, click the 'Continue to Checkout' button." and "To pay by check, select 'Invoice' in the Reports drop down box above and mail it with your payment to CFA Institute." Two buttons are present: "Return to Account Home" and "Continue to Checkout", with the latter highlighted by a purple box and a purple arrow pointing to it from the right.

- b. Select **Invoice** from the drop-down menu to receive an invoice to pay by check

This screenshot is similar to the previous one but shows the "Reports" dropdown menu open. The menu options are "Reports", "Reports -BI Publisher-----", "Invoice" (highlighted with a purple box and a purple arrow pointing to it from the right), and "My BI Publisher Reports". The "Continue to Checkout" button remains highlighted with a purple box.



8. Confirm your membership dues and, if selected, Research Foundation Donation payments, click **Continue**

**CFA Institute**

Account Home Customer Service Payment History Membership Events and Conferences CIPM Member Directory

Curriculum **Shopping Cart**

Enter Details Payment Confirm Receipt

**Shopping Cart**

Item	List Price	Offer Code 1 ?	Offer Code 2 ?	Net Price	Total
CFA Society	\$			\$	\$
CFA Institute	\$275.00			\$275.00	\$275.00
Research Foundation Donation	\$100.00			\$100.00	\$100.00

Recalculate

Discount \$0.00  
Total Price \$375.00

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

Empty Cart Continue

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9. Enter credit card information, click **Continue**

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Account Home | Customer Service | Payment History | Membership | Events and Conferences | CIPM Member Directory | Curriculum

Shopping Cart

Enter Details  | **Payment**  | Confirm  | Receipt

**Payment Method**

When entering credit card numbers:

- Enter a single strand of numbers/digits
- Do not enter spaces, hyphens, dashes, or other characters in the credit card field.

Type:\* Visa

Credit Card #:\* 4111111111111111

Cardholder's Name:\* C G T Thomas

Expiration Month:\* 6 Expiration Year:\* 2017

Billing Address Line 1:\* 560 Ray C Hunt Drive

Billing Address Line 2:

Billing City:\* Charlottesville

Billing State: VA

Billing Province:

Billing Postal Code: 22902

Billing Country:\* USA

**Continue** **Reset**

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10. Review your order, click **Confirm Order**

**CFA Institute**

Account Home   Customer Service   Payment History   Membership   Events and Conferences   CIPM Member Directory   Curriculum

Shopping Cart

Enter Details   Payment   **Confirm**   Receipt

**Order Summary**

Your order is not complete and your credit card will not be charged until you click "Confirm Order" at the bottom of the page.

Credit Card Type: Visa   Recipient: Claire Thomas  
Credit Card #: xxxxxxxxxxxx1111   Billing Address: 560 Ray C Hunt Drive, Charlottesville, VA 22902, USA

**Order Items**

Item	Comments	Net Price	Total
CFA Society		\$	\$
CFA Institute		\$275.00	\$275.00
Research Foundation Donation		\$100.00	\$100.00

Discount: \$0.00  
Net Price: \$375.00  
Tax: \$0.00  
Shipping: \$0.00  
Total Price: \$375.00

[CFA Institute Tax Policy](#)  
[International Shipping - Customs](#)

Edit Payment   Cancel Checkout   **Confirm Order**

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11. To print a receipt, click **Order Receipt** from the drop-down menu

The screenshot shows the CFA Institute website interface. At the top left is the CFA Institute logo. Below it is a navigation bar with links: Account Home, Customer Service, Payment History (highlighted), Membership, Events and Conferences, CIPM Member Directory, and Curriculum. Below the navigation bar is a Shopping Cart link. On the right side, there is a dropdown menu labeled 'Reports' with a downward arrow. The dropdown menu is open, showing options: Reports, Reports BI Publisher, Order Receipt (highlighted with a purple box), and My BI Publisher Reports. On the left side, under 'Order Summary', the following information is displayed: Order # 1-1323814813, Order Date 6/13/2013, and Comments.

### Sample Receipt

The sample receipt is titled 'RECEIPT' and includes the following information:

**CFA Institute**  
 CFA Institute ID: 6  
 Charlottesville, VA  
 22903  
 USA

ORDER DATE 6/13/2013


CFA Society	\$
CFA Institute	\$275.00
Research Fo	\$100.00
Discount	\$0.00
Shipping	\$0.00
Tax	\$0.00
<b>Total:</b>	<b>\$375.00 (USD)</b>
<b>Amount Paid:</b>	<b>- \$375.00</b>
<b>Balance Due:</b>	<b>\$0.00</b>

**PAYMENT**

Card Holder: C G T Thomas  
 Payment Method: Credit Card  
 Credit Card Type: Visa  
 Payment Amount: \$375.00  
 DATE PAID: 13 June 2013

-----  
 CFA Institute, PO Box 2082, Charlottesville, VA, 22902-2082, USA  
 Phone: 434-951-5499 • Toll free: 800-247-8132 • Fax: 434-951-5240 • info@cfainstitute.org

## Sample Research Foundation donation 'Thank You' letter

 <p><b>Research Foundation of CFA Institute</b></p> <p>28 Mar 2013</p> <p>Dear</p> <p>On behalf of the Research Foundation of CFA Institute, we gratefully acknowledge your contribution in the amount of \$10.00. Your gift will be listed as a contribution from an Anonymous donor on the Contributor List at the Research Foundation website.</p> <p>Gifts like yours enable the Research Foundation to continue to identify, fund, and publish practitioner-oriented research that is of practical value to you and your colleagues as investment professionals. As the Foundation continues to explore new and challenging subject areas, presenting them in a unique manner with unbiased perspectives, our endeavors are enhanced significantly by your interest and support.</p> <p>Sincerely,</p> <p>Jeff Bailey, CFA Chairman – Research Foundation of CFA Institute</p> <p>The Research Foundation is a Section 501(c)(3) organization under the Internal Revenue Code of the United States of America. No consideration was given in return for the contribution. Please consult your tax professional for determination of deductibility.</p> <p>560 Ray C Hunt Drive Charlottesville, VA 22903-2981 USA <a href="mailto:rf@cfainstitute.org">rf@cfainstitute.org</a> <a href="http://www.cfainstitute.org">www.cfainstitute.org</a></p>
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