

COMPLETING THE MEMBERSHIP APPLICATION REINSTATE FORM

1. Personal Information

National Identification Number. Print the digits and check the appropriate box. You are not required to disclose this number. It will be used as a secondary identification for membership records.

Name. Print your first name (given), middle name or initial, last name (surname), and suffix (if applicable). Do not use nicknames or titles.

2. Membership Information

CFA Institute ID Number. Enter your CFA Institute identification number in the boxes provided (if applicable).

Society. Print the name of the CFA Institute Member Society to which you are applying (if applicable).

3. Mailing Information

While CFA Institute uses reasonable efforts to mail materials to your preferred address, at times it may need to send materials to your secondary address.

Preferred Mailing Address. Check the appropriate box to indicate the address at which you prefer to receive correspondence from CFA Institute. Please be advised that certain carriers will not deliver to post office boxes. Also, in some localities using your business address as your preferred address may result in more efficient delivery service than using your home address.

Use of Contact Information. If you do not want your personal information, such as name and address, released to service providers or regulatory authorities, please check the appropriate box(es).

4. CFA Charter Status

Indicate your CFA charterholder or candidate status. If you are a candidate in the CFA Program, please indicate whether or not you have passed Level I of the program, and if so, what year you passed Level I.

5. Professional Conduct Statement

Review the statement and answer questions A through E by checking the appropriate box. Sign your name at the bottom of the page on the line marked "signature," as you would sign a check or other legal document. By signing you also agree to the Member's Agreement (see #6).

6. Member's Agreement

Read the Member's Agreement carefully. By signing, you are agreeing to adhere to CFA Institute Rules and Regulations as a condition to becoming a member of CFA Institute and, if applicable, a Member Society. By signing you also agree to the Professional Conduct Statement (see #5).

Once your membership has been reactivated, you will receive an online dues bill notification. CFA Institute and Society memberships may be reactivated separately pending approval by the society. If this situation occurs, you may receive a separate invoice for CFA Institute and Society member dues.

Membership reactivated between:	1 July - 31 December	1 January - 31 March	1 April - 30 June
CFA Charterholders, Regular/Affiliate Members:*	US\$	US\$	US\$
CFA Institute annual dues	225.00	113.00	0.00
Reinstatement fee	113.00	113.00	113.00
Total	338.00	226.00	113.00
Retired members:**	US\$	US\$	US\$
CFA Institute annual dues	40.00	20.00	0.00
Reinstatement fee	20.00	20.00	20.00
Total	60.00	40.00	20.00

*Society dues may vary according to their individual rates.

**If you believe you meet the requirements and would like to reactivate your CFA Institute membership on retired status, please submit a completed Status Change Form along with a completed Reinstatement Form and appropriate payment. You may find the retired status requirements and print a copy of the Status Change Form by visiting our Web site at: <http://www.cfainstitute.org/memresources/pdf/statuschn.pdf>