

RENEW YOUR MEMBERSHIP TODAY!

 New mode of payment  Revised fee  Early Bird window till 15 July 2020

Pay Society Dues

Local Society Dues in Local Currency



FAQ – CFA Society India Membership Renewal 2020-2021

Dt: 21 May 2020

Membership Renewal:

Q. What is the membership period for CFA Society India.

A. The membership period will be from **1 July 2020 to 30 June 2021**. This will be the same as your CFA Institute membership period.

Q. How can I change my current society membership to another?

A. Login into your CFA account and click “Manage your membership” to start. You can click “Add a new society” or “Replace/Remove” and complete all the required fields to proceed. After clicking “Add a new society” or “Replace society”, the page refreshes. The new society is added/replaced society is removed and the new society replaces it. Please note that society dues are non-transferable and non-refundable.

Q. If I re-join CFA Institute / CFA Society, can my dues be prorated?

A. Prorated membership dues are only applicable for individuals who join for the first time. Current / lapsed members are charged full dues for the member year in which they renew. This is applicable for CFA Society India dues as well. Please note that society dues are non-transferable and non-refundable.

Q. If I joined CFA Institute / CFA Society membership anytime from May 2019 through April 2020, do I need to renew my membership?

A. Yes. Our membership year runs from 1 July to 30 June. You will need to renew every year to ensure you have access to your membership benefits.

Society dues query:

Q. Why do we need to pay our CFA Institute and CFA Society Membership dues in different currencies? Why is the society decided to collect the dues in INR?

A: CFA Society India has taken a decision to collect dues in local currency driven by multiple reasons. The society was looking at flexibility to extend differential pricing to its members and protect its members from exchange rate fluctuations. The decision to proceed with dues collection in local currency was taken after ensuring that we follow local regulations and policies.

Q. What is the membership dues that must be paid?

- Regular & Affiliate membership Dues is **INR 3000 + GST** which is **INR 3540**
- Retired Membership Dues is **INR 800 + GST** which is **INR 944** (*only applicable with a discount code which is “PROFLEAVE”*)
- Member who renews before 15th July 2020 will be eligible for 20% discount on the actual membership dues, hence they will pay only **INR 2400 + GST** which is **INR 2832**

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FAQ – CFA Society India Membership Renewal 2020-2021

Q. CFA Society India offered free/complimentary membership last year? Why are we charged this year?

A. Yes, CFA Society India had extending free/complimentary membership to all existing members and new members who renew / joined CFA Society India membership for the year 2019-2020.

This was a one-time offer that the society had extended as it was celebrating 15 years of its formation. The membership to the society was US\$50 in the previous year.

Q. When can I renew to gain the benefit? Is there any discount?

A. Membership renewal for CFA Institute & CFA Society India is currently open and extended till 31st August this year. If you renew your society membership by 15 July 2020, CFA Society India is extending a 20% discount on the membership fee this year.

Q. What is the process to claim the discounted membership? Is there a code required?

A: There will be no code required. When you log in to your CFA Institute account and continue to pay your 'CFA Society India' dues on our before 15th July'20, your basket will show the discounted fee of INR 2400 + GST.

Payment Link:

Q. How do I pay for CFA Society India membership dues in INR? Is there a separate link for completing society renewal?

A: There will be a single sign on for completing membership renewal of CFA Institute & CFA Society India. Once you initiate and complete your CFA Institute membership renewal, you will be shown an option to continue to 'Pay CFA Society India Dues'. Kindly select the option and proceed further to complete renewal for society. Your payment to the society will be via PayPal which acts as a payment gateway for this process.

Q. If I fail to renew my society membership while renewing CFA Institute membership, how do I go back and complete my renewal?

A: We would request you to reach out to CFA Society India at membership@india.cfasociety.org for a link to proceed further and complete renewal. The society will provide you with the necessary link, login will be using your CFA Institute credentials only.

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PayPal payments:

Q. Why do I need to pay via PayPal to the society? Is there any alternative? I am not interested in creating a PayPal account.

A: Society has recruited PayPal as the vendor who will facilitate in collection of the payment in India, they will act as a payment wallet. After a lot of research, it was identified that PayPal was the only vendor who had operations in India and can integrate with the systems that CFA Institute uses for the membership dues collection globally. We understand that some of you would not wish to create an additional account with PayPal, however we are afraid that there are no alternate solutions available with us presently.

Q. I have an existing account with PayPal, can I use the same?

A. Yes, you can use an existing account.

Q. I have an account with PayPal. However, I don't wish to pay through the current credit card saved in my records? Is there an alternative?

A. Yes, you can add up to 10 cards details into your PayPal account at a time and can choose which ever to make respective payments.

Invoice Queries:

Q. Can I get a GST Invoice for the tax I pay to the society?

A: Yes, GST Invoice will be issued in the name of the Member and will be shared within 15 working days post the payment is made.

Q. I need a breakup of the GST amount in terms of CGST and IGST, how can I get an invoice with these details?

A: GST Invoice issued by CFA Society India will be shared with you within 15 working days post the payment is made. This invoice will be a detailed GST invoice as per the standards of Tax Authorities.

Covid-19 questions:

Q: Is CFA Institute providing any financial relief to members impacted by COVID-19?

A: Yes, CFA Institute is relaxing the Professional Leave status requirements for the 2020-2021 membership year by removing the requirement to have been an active member for five years to qualify for Professional Leave. This will help members who may not be able to work during this time (due to job loss, medical leave, etc.) by reducing dues from US\$275 to US\$100. (Note: Members that are working full-time in an investment position that would qualify for regular membership do not qualify for Professional Leave status.)

Q. Is CFA Institute extending the deadline for dues payments?

A: The member year will still end on 30 June. However, we are offering a grace period for payment of dues through August 31. Through this grace period, members will still receive and have access to member benefits and charterholders will still be able to use the CFA designation.

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Q: Is CFA Institute offering some additional member benefit to offset what might be perceived as a reduction in benefits this year due to canceled events, etc.?

A: We are transitioning many of our events to virtual events and we are curating resources to help members weather the crisis. Below are some of our references:

- [Coronavirus and Market Volatility: Asset Management Resources](#)—Explore our curated collection of research and policy measures to support our responses to this global disruption.
- [Webinars and Virtual Events](#)—See how we are delivering valuable content about current events in a virtual format.
- [Career Center: Resources for Your New Reality](#)—Find resources to support your productivity, time management, and more as your work arrangements change.
- [CFA Institute Updates](#)—Visit our website to see how we are responding to business disruptions.

Subscribe to these newsletters:

- [Selections](#)—Visit the Communication Preferences Center to opt in or update your topics and receive a monthly e-newsletter with content matched to your interests.
- [Enterprising Investor](#)—Subscribe to our blog to receive timely, practical analysis on current events through practitioner’s lens.
- [Asia-Pacific Research Exchange \(ARX\)](#)—Share, learn, and engage on industry topics and trends specific to the Asia-Pacific region.

Professional Leave:

Q: If I qualify, how do I obtain Professional Leave status?

A: Members can complete and attest to their Professional Leave status via their online account through the Membership tile and during the renewal process. The request is processed immediately and applies to their CFA Institute and local society membership. Members approved for Professional Leave status with CFA Institute are simultaneously granted Professional leave status in their society.

Q: I’m a CFA Charterholder. Can I use the designation if I am on Professional Leave status?

A: Yes, members with Professional Leave status retain full benefits, including the use of the charter for members who are charterholders.

Q: Does Professional Leave status discount my society dues?

A: Professional Leave status is automatically applied to your society membership. CFA Society India offers a discounted due of INR 800/- + tax for its members. But to use the discount member need to use the discount code which is “PROFLEAVE”

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Membership Benefits:

Q. Can you share details on the work done by CFA Society India in the last 15 years?

A. CFA Society India's mission is to promote ethical and professional standards within the investment management industry, across the country and beyond.

We facilitate the exchange of information and opinion among people within the local investment community through our online and offline content.

We work to further the investors understanding of the CFA designation and broaden career opportunities for our members through our career services function.

Our advocacy efforts have ensured that we are a strong voice that is heard by regulators while they develop professionalism and governance for the investment management industry.

Through over 100 events annually, across all chapters, we thrive to provide our members quality opportunities for continued professional development.

If you are interested to know any specific details, you can reach out to us at membership@india.cfasociety.org.

You can also follow us on our social media pages or visit our website www.cfasocietyindia.org for more details.

Q. Society Member Benefits

A: Benefits of CFA Society India membership

- Networking at one of the many events
- Free/discounted access to large events such as the India Investment Conference, Wealth Management Conference and Financial Talent Summit.
- Free/discounted access to events with international speakers
- Access to global passport program (which gives you an opportunity to attend events in other participating countries when you travel)
- Discounts to Partner conferences.
- Free access to Career Center and the opportunity to attend Talent Summits.
- Volunteering opportunities which help you contribute to the industry and community.

(In case of specific questions on the society, they can write to membership@india.cfasociety.org)

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Miscellaneous:

Q. When was CFA Society India established?

A. CFA Society India was established in April 2005.

Q. How many chapters does CFA Society India include?

A. CFA Society India has nine chapters – Ahmedabad, Bengaluru, Chennai, Delhi, Hyderabad, Indore, Kolkata, Mumbai and Pune.

Q. Whom to reach out to in case of any questions.

A: If you have any questions/query regarding the membership renewal process, please email us at membership@india.cfasociety.org.

Q. I am not able to access my account.

A: Go on to www.cfainstitute.org. Select 'Log In' from top right corner of the screen. Then select 'Need help logging in' and pick up the relevant option to proceed.

Alternatively, you can also reach out to CFA Institute at info@cfainstitute.org. Please include your full name and CFA Institute ID number when you reach out to CFA Institute.

If you want to speak to a CFA Institute representative, you can reach out on the toll-free line of customer service: 000-800-852-1157. The Global Customer Service Team in Charlottesville, VA, offers 24-hour telephone support Sunday 5:00 a.m. to Friday 5:00 p.m., Eastern Time (ET) (i.e. Sunday 2.30 p.m. to Saturday 2.30 a.m. India time).