

Certificate in Insurance

Establishing core competence
in insurance practice



2007/8 | Information for Candidates



CII

Join the CII and enjoy extra benefits to support your studies

If you are new to the insurance or financial services industry or are progressing your studies, belonging to the Chartered Insurance Institute enables you to accelerate your career development. As a CII member you can gain the competence, knowledge and understanding required to succeed.

CII statistics for 2006 examinations showed that on average CII members were 11% more likely to pass their examinations than non-members.

As a CII member you will enjoy:

Help in passing your exams

- Loan copies of textbooks recommended for additional reading
- In depth, regularly updated online fact files to complement the core study texts
- Online technical dictionaries to help you with unfamiliar terminology
- Free access to examination-related learning and revision materials and an online resource centre (www.cii.co.uk/knowledge)

Help in developing your career

- Industry recognised designatory letters – Cert CII – available exclusively to qualified members on application helping to make your CV stand out from the crowd
- Regular email bulletins to keep you up to date, relevant to your role in the industry
- Online access to a career support centre (www.cii.co.uk/careersupport) to help you plan your career

What's more, membership isn't likely to cost you anything

The majority of employers will pay for membership. And in the event that yours doesn't, the discounts available on learning materials, exams, seminars, study and revision days means membership is likely to pay for itself.

And if you live in the UK and pay your membership from your earnings you can claim tax relief from HM Revenue and Customs.

There's never been a better time to be a member

CII faculties have been established to cater for the various elements of this vibrant and fast-moving market. You can join a faculty of your choice when you become a CII member and you will receive market sector information and guidance relevant to you. And the local institutes offer a great way to network with other colleagues and provide mentoring, support and guidance to members.

To find out more about the full range of CII member services visit www.cii.co.uk/membership JOIN TODAY by completing the form at the back of this brochure.

A practical aid to your personal development: Job role and competency framework

To build a career in the insurance industry you must have the knowledge, skills and behaviours (the core competencies), needed to perform your role effectively, both now and as your career progresses.

To help you develop your potential, the CII has created a FREE online 'Job Role and Competency Framework'. This is ideal for all those employed in the key disciplines of Claims, Broking and Underwriting.

The key to the Framework is that it reflects your needs. You select from a range of criteria (such as 'Area of business',

'Job role' and 'Competency type'). The system then brings up the required competencies for your role and explains what you need to know. Crucially, it signposts tools to help you achieve this, including: exams, training, online training tools and other sources of relevant information.

By establishing objective industry standards it provides benchmarks against which you can measure your personal development needs and achievements.

Discover the benefits for yourself by visiting www.competency.cii.co.uk

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The Chartered Insurance Institute (CII)
Professionalism in practice



As the premier professional body for the financial services profession, the CII promotes higher standards of integrity, technical competence and business capability.

With over 90,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to this sector.

Success in CII qualifications is universally recognised as evidence of knowledge and capability. Membership of the CII signals a desire to develop broad professional capability and subscribe to the standards associated with professional status.

The CII works with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by boosting employees' technical and professional competence.

Individually, CII's members are able to drive their personal development and maintain their professional standing through an unrivalled range of learning services and by adhering to the CII's Code of Ethics & Conduct.

Further information on the CII and its wide range of products and services can be found at www.cii.co.uk

The knowledge, and how

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Certificate in Insurance

Building knowledge, developing core competence

Qualifications offered by the CII are recognised throughout the insurance industry as evidence of commitment, knowledge and understanding. They underpin job-specific and at-work training, and help you to deliver a capable, professional service.

The Certificate in Insurance is a core qualification for insurance staff working across all sectors of the industry (and the logical progression from the introductory-level Foundation Insurance Test). It provides a grounding in:

- basic insurance principles including the regulatory environment;
- the key insurance disciplines of underwriting and claims; and
- popular products including: motor, household, healthcare and packaged commercial insurances.

It supports role-specific learning which will assist you to develop the relevant knowledge, skills and behaviours needed to succeed.

The Certificate is modular in structure, enabling you to select units of study according to your preference and career requirements. Each unit has a credit value and the accumulation of the stipulated number of credits leads to the award of the Certificate which will entitle you to apply to use the designation 'Cert CII®' (CII membership and Continuing Professional Development requirements apply).

Note: sector specific designations 'Cert CII (London Market)' and 'Cert CII (Claims)' are available to candidates completing the Certificate that have passed the Lloyd's and London Market Introductory Test (LLMIT) or Insurance claims handling process (IF4) unit, respectively. Faculty membership requirements also apply.

Upon completion you will gain recognition, in the form of credits, that can be used towards the next qualification in the framework of CII qualifications, the Diploma in Insurance.

Flexible and comprehensive

The Certificate is ideal for individuals working across a wide range of organisations and roles. It is suitable for staff within insurance companies, brokers and related organisations, whether they are directly involved in insurance practice or employed in support functions such as human resources, marketing, IT and finance.

By covering a broad range of core topics, the Certificate allows you to develop the knowledge and confidence you need before you begin to focus your subsequent studies and specialise according to your ambitions and career requirements. This qualification is the first step towards becoming professionally qualified and, as such, its value is widely recognised by employers throughout the insurance industry.

Importantly, the Certificate has been designed to assist you and your employer to comply with regulatory training and competence requirements.

The Financial Services Authority (FSA) requires employees to demonstrate that they are competent in the work they do, and thereafter to maintain this competence. This approach is designed to ensure that employees have the appropriate knowledge and skills to perform their role effectively, and the Certificate can play an important role in helping to meet the requirements by serving as an objective measurement of your technical awareness and understanding.

Given the regulatory context and ever higher consumer expectations, employers increasingly expect their staff to be qualified. They recognise that knowledgeable staff have a key role to play in raising and maintaining standards within their organisation.

Clearly, studying for the Certificate is essential for anyone intent on building a career in today's insurance industry.

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The Certificate provides a grounding in basic insurance principles including the regulatory environment, key insurance disciplines and popular products.
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Insurance qualifications framework

For details on the full range of qualifications within the framework please see the Overview brochure ref: IOB001 (10/07) available online at www.cii.co.uk or from Customer Service.

Qualifications and Curriculum Authority (QCA) accreditation

The QCA is responsible for standards in education and training. The Certificate in Insurance is accredited with the QCA as 'CII Level 3 Certificate in Insurance' and is included in the National Qualifications Framework. The Certificate is only accredited where it is completed using Certificate units IF1-IF8. For further information please refer to the QCA website at www.qca.org.uk

Funding may be available for candidates studying for qualifications listed in the National Qualifications Framework. For further details regarding funding, please refer to the Learning and Skills Council website at www.lsc.gov.uk

Note: For QCA accredited qualifications, 'the regulatory authorities' logo(s) on the certificate indicate that the qualification is accredited only for England, Wales and Northern Ireland.

Why the Certificate in Insurance?

The Certificate delivers many advantages:

- Enhances your career prospects by demonstrating commitment to self-improvement: it is the starting point for anyone who is serious about a career in insurance.
- Can form part of an overall programme to meet the regulator's training and competence requirements.
- Has no formal entry requirements so is open to anyone, irrespective of age, experience or educational background.
- Supports personalised learning programmes as you select the topics most appropriate to your role, rather than follow a rigid pre-set learning programme.
- Provides online exam sittings that enable you to enter for the exam when you are ready, with results provided instantaneously.
- A 'Record of Achievement' is awarded for each unit passed and a 'Certificate in Insurance' is awarded upon completion, providing portable and permanent evidence of learning undertaken.
- Upon completion you can apply to use the designation 'Cert CII' providing a means of demonstrating educational achievement to the public and to peers (CII membership and Continuing Professional Development requirements apply).
- Forms part of logical progression of CII qualifications. Having successfully completed the Certificate in Insurance you will hold credits that can be used towards the Diploma in Insurance.

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The Certificate enables you to devise a personalised learning programme, as you select the topics most appropriate to your role and career aspirations, rather than follow a rigid pre-set learning programme.

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Is the Certificate in Insurance right for me?

The Certificate is open to anyone, irrespective of educational background or experience.

It is suitable for a diverse range of people, including:

- Anyone wishing to gain a broad understanding of insurance principles, key disciplines and products.
- Employees who have no formal insurance qualifications but wish to objectively demonstrate insurance knowledge and understanding.
- Anyone working in specific technical claims handling or underwriting roles within a call or service centre environment.
- Insurance staff employed in support functions such as human resources, marketing, IT and finance, wishing to develop an understanding of the industry in which they work.
- Staff working for an organisation whose primary business is not insurance, but which offers insurance advice and products as part of its overall service to customers.
- Providers of services to insurers or insurance intermediaries.
- Staff needing evidence of achievement for the technical certificate requirement within foundation and advanced modern apprenticeships for insurance can use the CII's Level 3 Certificate in Insurance for this purpose.

Your next step

Now that you have read about the Certificate in Insurance, gained an understanding of what it offers and decided that it meets your career development plans, it is time to finalise your entry.

The following pages contain all the information you require to study for and complete this qualification. As you read through these, you will learn about the units on offer, the available learning materials, terms and conditions relating to entry, and the different ways you can enter.

Please take the time to read this, as it will help you choose the study programme that best fits your needs.

You can also access FAQs at www.cii.co.uk/faq



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Upon completion you can apply to use the designation 'Cert CII' providing a means of demonstrating educational achievement to the public and to peers.

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What does the Certificate in Insurance involve?

To achieve the Certificate in Insurance you must accumulate a minimum of 40 credits.

Candidates are required to take (IF1) Insurance, legal and regulatory – worth 15 credits or (P01) Insurance practice and regulation (a Diploma in Insurance unit worth 20 credits).

Note: anyone who has passed unit P01 is precluded from taking units IF1 or IF2 on account of the degree of syllabus overlap.

The balance may come from any combination of the available units:

| Certificate in Insurance units | Credits |
|---|-------------|
| (IF1) Insurance, legal and regulatory – Compulsory unit | 15 per unit |
| (IF2) General insurance business | |
| (IF3) Insurance underwriting process | |
| (IF4) Insurance claims handling process* | |
| (IF5) Motor insurance products | |
| (IF6) Household insurance products | |
| (IF7) Healthcare insurance products | |
| (IF8) Packaged commercial insurances (examinations begin January 2008) | |

* Should you pass (IF4) Insurance claims handling process, you will, on completion of the Certificate, be entitled to use the discipline specific designation Cert CII (Claims). CII/Claims Faculty membership requirements apply.

| | |
|---|----|
| Lloyd's and London Market Introductory Test (LLMIT) Created by a cross-section of leading organisations, this single-unit course develops an understanding of how business is transacted in this specialised sector and of the roles and responsibilities of those involved. Full details can be found at www.lloydstraining.co.uk Should you pass LLMIT, you will, on completion of the Certificate, be entitled to use the market specific designation Cert CII (London Market). CII/London Market Faculty membership requirements apply. | 15 |
|---|----|

Certificate candidates may also select units from other CII qualifications. A listing of these units is provided below. Full details are available online at www.cii.co.uk or from Customer Service.

| Award in Insurance unit | Credits |
|---------------------------------|---------|
| (FIT) Foundation Insurance Test | 6 |

| Diploma in Insurance units | Credits |
|---|-------------|
| (P01) Insurance practice and regulation | 20 per unit |
| (P04) Business practice | |
| (P18) Property claims handling | |
| (P21) Commercial insurance contract wording | |
| (P80) Underwriting practice (first examination session October 2008) | |
| (P81) Insurance broking practice (first examination session October 2008) | |
| (P05) Insurance law | 25 per unit |
| (P10) Commercial insurance practice | |
| (P11) Personal insurance practice | |
| (P13) Marine and aviation insurance (final examination sitting October 2008) | |
| (P17) Operational management (final examination sitting October 2008) | |

| Advanced Diploma in Insurance units | Credits |
|--|-------------|
| (510) Risk, regulation and capital adequacy | 30 per unit |
| (530) Business and economics | |
| (555) Life and disability underwriting | |
| (556) Life and disability claims | |
| (655) Risk management | |
| (735) Life assurance | |
| (745) Principles of property insurances | |
| (750) Commercial property insurance underwriting | |
| (755) Liability insurance | |
| (760) Personal lines insurance | |
| (765) Motor insurance | |
| (770) Principles of marine insurance | |
| (775) Marine insurance underwriting (final examination sitting October 2008) | |
| (780) Aviation insurance (final examination sitting October 2008) | |
| (785) Principles of reinsurance | |
| (790) Private medical insurance | |
| (815) Underwriting management | |
| (820) Claims management (non-life) | |
| (825) The application of reinsurance (final examination sitting October 2008) | |
| (930) Insurance broking | |
| (940) Finance and accounting (final examination sitting October 2008) | |
| (945) Marketing | |
| (CITIP)Certificate in IT for insurance professionals | |
| (955) London Market underwriting (final examination sitting October 2008) | |

This approach has been adopted to provide you with maximum flexibility, enabling you to choose different units from those currently available across our entire qualifications framework. Units from the Diploma and Advanced Diploma are worth a higher credit value, allowing completion of the Certificate in a lower number of units. See the section headed 'Flexible learning options' on page 12 for full details.

This flexible approach allows you to develop a course programme that suits your particular needs and requirements. You can tailor learning to your current role and/or develop areas which are new to you or where you need to gain in-depth knowledge.

The mechanics of studying for Certificate units

There is no prescribed order in which units must be taken, but it is strongly recommended that you sit (IF1) Insurance, legal and regulatory first since this provides foundation knowledge upon which the other units build.

| Units | Exam format | Length of exam | Nominal passmark | Study hours |
|-------------|---|----------------|------------------|-------------|
| IF1/IF2/IF7 | 100 multiple choice questions | 2 hours | 70% | 50 |
| IF3/IF4/IF8 | 75 multiple choice questions | | | |
| IF5/IF6 | 50 multiple choice questions and 25 mini case study multiple choice questions | | | |

Certificate in Insurance exams are delivered online at centres located throughout the UK. Twice-yearly paper-based exam sessions are available for candidates outside the UK. See below for further information.

You are also urged to give careful thought to your chosen method of study. The CII has developed a portfolio of study options and revision aids to support learning for the Certificate.

The portfolio includes:

- correspondence courses;
- study texts with online study support;
- online interactive tutorials;
- examination guides;
- key facts booklets; and
- face-to-face training courses.

Full details on all of these can be found within the section headed 'Study options and revision aids' on page 13. Discounts are available on these items for CII members.

UK examinations online

UK Certificate exams are delivered and tested online. This delivers the following benefits:

- You enter for exams when you are ready.
- You receive provisional notification of your results immediately upon completion.
- You can progress with your studies at a pace that matches your study and career aspirations.
- Should you fail an exam you can re-sit seven working days from receipt of your formal results notification (subject to exam centre availability).

How do online exams work in practice?

Full details on online exams can be found at www.cii.co.uk/online In summary, the process works as detailed overleaf.

The online exam service is not yet available outside the UK. If you are sitting a Certificate exam outside the UK, please see the section headed 'Non-UK exam entries' on page 9.

1. Entering for an exam (UK only)

Applications for exam entry can be accepted from between three months to seven working days before the day of the exam you wish to sit.

You have two methods of entering:

- Online at www.cii.co.uk
- By phone on +44 (0)20 8989 8464

When booking you need to consider where and when you want to sit the exam. We currently offer more than 60 exam centres selected for their accessibility via rail/road links. You choose the date and time of your exam from those listed for each centre. Availability will vary from centre to centre in accordance with patterns of demand.

Address details and information concerning parking and disabled access for each centre are available online.

We recommend booking six weeks in advance to give the best chance of getting your preferred exam date and timing.

2. Confirmation process

Once your exam entry has been accepted an 'Admission Document' will be despatched to you within two working days confirming:

- Unit title(s) and code(s)
- Date and time of exam(s)
- Exam centre address
- Confirmation of any other exams booked

The terms and conditions applicable to your exam entry and post-exam procedures should be viewed at www.cii.co.uk/notestoexams Please note that in entering for an exam you agree to be bound by these terms.

3. Sitting the exam

On the day of the booked exam you should attend your chosen centre, following the instructions at www.cii.co.uk/notestoexams, in particular bringing the required identification with you.

Before you commence the exam there is an 'Exam Simulation' which you can use to familiarise yourself with the exam process. The exam does not require any pre-existing IT skills, with the actual process being very straightforward.

Upon completion you will receive an immediate provisional notification of your results.

A formal results notification will be despatched to you within seven working days.

Where you pass, you will be sent within ten working days your 'Record of Achievement' and, where appropriate, the 'Certificate in Insurance Completion Certificate'. Where you fail, you will be able to submit for a re-sit upon receipt of your formal results notification. Alternatively, you can continue your studies by entering for the next Certificate unit.

Non-UK exam entries

Paper-based Certificate exams will continue at non-UK exam centres throughout 2008. You can sit the exam at one of the centres listed on page 19 in either April or October. See below and overleaf for details of important deadlines and the exam timetable.

Important deadlines

The following information is only applicable to those candidates wishing to sit exams outside the UK. UK candidates should refer to page 7.

The importance of the following dates cannot be overstated. Deadlines for applications for exam entry and exam sittings will not be changed. The CII will not enter into negotiation in respect of any of the following dates:

| | April 2008 Exams | October 2008 Exams |
|---|--|--------------------|
| Applications for tuition and for accreditation of prior learning are accepted at any time. However, we recommend that you apply for tuition ideally at least three months before the exam date | Please allow twenty one days to non-UK address from receipt of your correctly completed form | |
| Closing date for your exam entry and payment to reach the CII | | |
| At normal fee (changes to exam entries, etc. <u>not</u> accepted after these dates) | 29 Feb 08 | 29 Aug 08 |
| At late entry fee | 28 Mar 08 | 26 Sept 08 |
| Exam entry confirmation* | Despatched within seven working days from receipt of application form | |
| Receive your exam admission permit* | Despatched six weeks before the exams begin | |
| Sit exams | 14-16 Apr 08 | 13-15 Oct 08 |
| Exam results released online www.cii.co.uk | 23 May 08 | 21 Nov 08 |
| Exam results posted | Results are sent by 1st class post on the dates shown above. Please allow fourteen days for delivery | |
| Entry for the next exam | You do not have to wait for your results before entering for another exam | |

* Please call Customer Service if you do not receive these. When you receive your **admission permit** you **MUST** check whether any change has been made in the dates or times of the units for which you have entered and that the units shown on your permit are those that you intend to sit. If there is any discrepancy you should contact Customer Service immediately.

Note: Results are available at www.cii.co.uk from 08.00 on the dates shown above. You will require the following information in order to access these:

- permanent identity number (PIN);
- date of birth; and
- candidate number – as shown on your most recent exam admission permit.

Exam timetable

The non-UK exam dates for 2008 are 14-16 April, 13-15 October. The CII reserves the right to make changes to the published dates where necessary.

You should check carefully that you are not entering for units which are scheduled for examination at the same time. The timetable cannot be altered to avoid clashes.

| Monday 14 April / 13 October 2008 | |
|--------------------------------------|--|
| 10.00 | (IF1) Insurance, legal and regulatory (IF6) Household insurance products (IF7) Healthcare insurance products (IF8) Packaged commercial insurances |
| Tuesday 15 April / 14 October 2008 | |
| 10.00 | (IF2) General insurance business (IF4) Insurance claims handling process |
| Wednesday 16 April / 15 October 2008 | |
| 10.00 | (IF3) Insurance underwriting process (IF5) Motor insurance products |

What does the Certificate in Insurance cover?

The Certificate provides a solid grounding in basic insurance principles, key disciplines and general (non-life) insurance products.

Certificate exams are based on the published syllabuses, which are in themselves important aids to exam preparation and revision. It is essential that you familiarise yourself with these before commencing study (a full syllabus is provided within each study text).

These set out the objectives of each unit and detail the learning outcomes expected of candidates in the exam.

The syllabuses also identify published material designed to assist you in preparing for exams under the following headings: primary text, reference works and periodicals.

To obtain the syllabuses free of charge, visit www.cii.co.uk and look within the section on 'Qualifications'. Copies may also be obtained from Customer Service.

The Certificate units cover:

(IF1) Insurance, legal and regulatory

Objective: To provide knowledge and understanding of basic insurance principles and practice, including how the profession conducts business within the legal and regulatory framework and the various organisations and roles of the insurance market.

(IF2) General insurance business

Objective: To provide knowledge and understanding of basic insurance products and practice, including underwriting and policy wordings, claims, customer service and information and communication technology.

(IF3) Insurance underwriting process

Objective: To provide knowledge and understanding of the role of underwriting including identification, assessment and acceptance of risk, rating and relevant financial factors.

(IF4) Insurance claims handling process

Objective: To provide knowledge and understanding of the claims handling process including notification, assessment, settlement and associated financial factors.

(IF5) Motor insurance products

Objectives:

- To provide knowledge and understanding of the practices and procedures connected with private motor, motorcycle and commercial motor insurance, with reference to applicable legal and regulatory considerations.
- To develop in candidates an ability to apply product knowledge and understanding on straightforward cases where unaccompanied but supervised advice is given.

(IF6) Household insurance products

Objectives:

- To provide knowledge and understanding of the practices and procedures of household insurances and associated forms of cover.
- To develop in candidates an ability to apply product knowledge and understanding on straightforward cases where unaccompanied but supervised advice is given.

(IF7) Healthcare insurance products

Objective: To provide knowledge and understanding of the fundamental principles and practices relating to healthcare insurance.

(IF8) Packaged commercial insurances

Objective: To provide knowledge and understanding of packaged commercial insurances, their coverage, arrangement and operation in the insurance market.

Flexible learning options

The overall CII insurance qualifications framework is extremely flexible, allowing you to select units from qualifications other than the one for which you are studying. Therefore, if you are working towards the Certificate in Insurance you are also able to select from the Award in Insurance and also the higher level qualifications, the Diploma in Insurance and Advanced Diploma in Insurance, as described on page 5. This allows you to complete the Certificate in a lower number of units since the units from the higher level qualifications are worth a greater number of credits.

If you sit or have sat CII financial planning exams (for example, the Financial Planning Certificate[®], Certificate in Financial Planning, Diploma in Financial Planning, Advanced Diploma in Financial Planning or Advanced Financial Planning Certificate[®], or comparable exams from other professional and educational bodies), you will also receive credits that can count towards completion of the general insurance qualifications. When studying for the Certificate you are allowed to claim up to 30 credits in respect of financial planning units. To find out the credits applicable for CII exams please contact Customer Service. For all other exams please complete the 'Individual prior learning accreditation' form provided at the back of this brochure.

Proceed with care

Care should be exercised when considering the selection of units from higher level qualifications. Units at a higher level are naturally more complex, typically covering technical issues in more detail, requiring more study hours and, in many instances, involving written essay style answers.

For these reasons, we would strongly recommend that you first sit and pass the compulsory Certificate unit (IF1) Insurance, legal and regulatory and then familiarise yourself fully with the demands involved in sitting a higher-level qualification unit prior to entering.

Accreditation of prior learning

Credits may be awarded for prior learning, including exams that you may have already passed under discontinued CII qualification routes. These credits can be used as part of your route to the qualifications of Certificate, Diploma and Advanced Diploma.

As detailed above, study undertaken on the CII's financial planning exams, or comparable exams from other professional bodies can also attract credits.

Exemptions claimed under the previous qualification scheme in respect of non-CII qualifications also have a credit value, equivalent to their exemption value. For example, holders of the Lloyd's Introductory Test/Lloyd's and London Market Introductory Test receive 15 credits at Certificate level.

If you have previously passed a CII exam or obtained exemptions you will automatically have had the appropriate credits added to your 'Learning Account' with the CII. You can request details online at www.cii.co.uk/customerservice or by calling Customer Service.

If you wish to claim credits in respect of other non-CII exams passed or qualifications held, please complete and return the 'Individual prior learning accreditation' form at the back of this brochure, being sure to include the requested supporting information.

Prizes

Each year the CII may award a number of prizes for exceptional performance in its qualifications. These prizes cover a variety of situations, such as completing a qualification, the best performance in a single unit or certain groups of units, and exemplary performance by those working in certain sectors of the industry. The prizes are sponsored by a wide range of organisations within the insurance and financial services industry. Full details can be found at www.cii.co.uk within the information provided on each qualification.

Should you not wish your contact details to be given to the sponsor of a prize for which your exam performance may make you eligible, you should indicate this by ticking the appropriate box in the 'Declarations' section of the application form.

Study options and revision aids

To help you pass the Certificate exams first time we have developed a comprehensive portfolio of study options and revision aids which have been proven to enhance the chances of exam success. These can be ordered online at www.cii.co.uk over the phone by calling Customer Service on +44 (0)20 8989 8464, or by post/fax using the application form at the back of the brochure.

The prices quoted are for individuals. Companies requiring pricing information for groups of employees should call +44 (0)20 8530 0815.

CII members benefit from a discount on the price of study options and revision aids.

There are currently two study options – study text with correspondence course and study text. In addition, regardless of which study option you choose, there is a standard exam entry fee of £83 CII members and £113 non-members for all Certificate units.

Important notes:

- You must purchase the study text which is appropriate for the period during which you plan to sit the exam:
 - If you are planning to sit an exam in 2007 you will need to purchase the 2007 edition of the study text. The 2007 version is only available by phone from Customer Service and must be specifically requested. Should you purchase the 2007 version and subsequently not enter the exam in 2007, or, if you enter and fail to pass, you will need to purchase the study text update service to receive the new edition.
 - Study texts and revision aids purchased up to the end of September 2008 are applicable to all exams taken in the period January-December 2008.
 - Study texts and revision aids purchased from October 2008 are applicable to all exams taken in the period January-December 2009.
- Electronic updates for the study text purchased will automatically be made available free of charge to all purchasers for the duration of the exam period to which the study text applies. Full details are provided with each study text purchased.

| Study options | Cost per unit | |
|--|---------------|-------------|
| | Member | Non-member |
| Study text with correspondence course (all units except IF8) | £145 | £172 |
| <p>This is a distance learning course. The package includes the provision of a study text and electronic updates (see 'Important notes' above) together with the suite of online study services outlined in the 'Study text' option below. These have been developed to assist you in understanding and learning the topics covered by the exam syllabus.</p> <p>You will also have the option to complete a series of assignments testing your knowledge and application of the study text. These are marked by an expert tutor and returned with their comments and a model answer so that you can gauge your progress as you proceed through the study text. This option also includes a written enquiry service where advice can be sought on specific issues.</p> <p>Results show that candidates who study by correspondence course achieve a better record of exam success than those using a study text only.</p> | | |
| Study text (all units, IF8 available Nov 2007) | £99 | £116 |
| <p>This is a distance learning course. It includes the provision of a study text and electronic updates (see 'Important notes' above), developed to assist you in understanding and learning the exam syllabus.</p> <p>You will also have access to an unrivalled suite of online services to support your studies. To be delivered during the course of 2007/first quarter 2008 these will include a multiple choice test facility covering each chapter, definitions of key terms, specimen exam and hints and tips.</p> <p>There will also be additional learning content providing worked examples and essential facts. You will also access a study planner that includes a test-tracking facility which records study undertaken against a personally selected study plan. Full details will be provided with your study text.</p> | | |
| Study text update service (all units) | £45 | £56 |
| <p>As the study text is a valuable reference tool in your day-to-day job, we offer an option to receive the next edition of the study text together with electronic updates. You will automatically be sent an invitation to update your material.</p> | | |
| Upgrading your study text option (all units except IF8) | £46 | £56 |
| <p>If after buying the study text you wish to upgrade to the correspondence course, you can do so within the exam period to which your study text applies. The correspondence course enrolment will be live for the duration of same exam period.</p> | | |

| Revision aids | Member | Non-member |
|--|-------------------------|-------------------------|
| Examination guides (all units) | £10.58 (inc VAT) | £11.75 (inc VAT) |
| These comprise a complete specimen examination and answers, which also highlight the syllabus areas covered, and include useful hints on how to pass the exam. These are available online at www.cii.co.uk being supplied as PDF files for you to print off as and when required for your own use. Note: the content of the latest exam guide is included within the online support services provided with all study text purchases. | | |
| Key facts booklets (all units except IF7, IF8 available from December 2007) | £21 | £23 |
| Comprehensive pocket-sized booklets summarising the key information contained in the study text. These are perfect for studying when travelling to and from work or in situations when reading the study text is impractical. | | |
| Winning the brain game (CD-ROM) | £28 | |
| Improving study and exam techniques can help everyone, at whatever age, and whatever the qualification. This is a highly inventive and fully interactive programme. The Daily Telegraph said of this 'A top five star rating for originality'. Operates on all Windows software. | | |
| ed.LEARN® (IF1, IF2, IF5, IF6) | £77.55 (inc VAT) | |
| Online tutorial providing highly interactive study, backed by a revision assessment tool to check understanding as you progress with your studies. Includes the option to purchase an online study text. Visit www.ed.cii.co.uk to view the course demo and to buy online. Minimum operating requirements: P200 processor, running Windows 98, NT4, 2000, ME, XP or Vista; Internet Explorer 6 or above; 8 speed CD-ROM. | | |
| Computer-based training CD-ROM (IF1, IF2, IF5, IF6) | £72 | |
| Same tutorial and assessment tool as above, but supplied on CD-ROM. Minimum operating requirements as above except 80MB free hard disk space required for installation. The CD-ROM is for individual users only and is not to be networked or lent to others. Corporate licences are available on request from Customer Service on +44 (0)20 8530 0815. | | |
| Revision days (all units except IF6 and IF7 – see table opposite) | £170 | £195 |
| These enable you to: <ul style="list-style-type: none"> • discuss the main mistakes made by candidates and how to avoid them; • learn useful revision and exam techniques; • clarify your areas of concern in the syllabus. | | |

“
In 2007 candidates who attended a CII revision course improved their chances of exam success by up to 60%*
”

* Source: CII Statistics 2007.

Revision courses 2008

| Revision days | Dates | Venue |
|---|---|------------|
| (IF1) Insurance, legal and regulatory | 14 Jan/11 Feb/14 Apr/16 May/16 Jun/14 Jul/11 Aug/ 13 Oct/10 Nov/08 Dec | London |
| | 04 Mar/05 Sept | Manchester |
| (IF2) General insurance business | 16 Jan/12 Feb/15 Apr/15 May/17 Jun/15 Jul/12 Aug/ 14 Oct/11 Nov/09 Dec | London |
| | 06 Mar/03 Sep | Manchester |
| (IF3) Insurance underwriting process | 17 Jan/13 Feb/16 Apr/19 May/18 Jun/16 Jul/13 Aug/ 15 Oct/12 Nov/12 Dec | London |
| | 07 Mar/04 Sept | Manchester |
| (IF4) Insurance claims handling process | 22 Feb/23 May/17 Jul/17 Oct | London |
| (IF5) Motor insurance products | 21 Feb/28 May/18 Jul/20 Oct | London |
| (IF8) Packaged commercial insurances | 18 Jan/15 Feb/17 Apr/12 May/19 Jun/22 Jul/14 Aug/16 Oct/ 13 Nov/11 Dec | London |

You should have purchased and thoroughly learnt the self-study materials in advance of the course. You will need to bring these materials with you on the course.

Note: remember to visit www.cii.co.uk for details of additional courses that we will be running during 2008.

Costs, fees and refunds

Fees applicable for the period 01.10.2007-31.12.2008.

| CII membership | |
|---|--|
| For those candidates wishing to become CII members, one of the subscription fees shown opposite are payable, in addition to a one-off £36 admission fee. | London only – £5.83 per month or £70 per annum |
| * A discounted membership fee is available for individuals resident in the following countries that have, with the exception of those countries marked with a †, been categorised as 'low Gross Domestic Product (GDP) per capita' in the Human Development Report 2003, published by the United Nations Development Programme: Azerbaijan, Angola, Bangladesh, Central African Republic, Egypt, Eritrea, Ethiopia, Gambia, Ghana, Georgia, †Guyana, India, Indonesia, Kenya, Lesotho, Malawi, Moldova (Republic of), Mongolia, Myanmar (Burma), Nepal, Niger, Nigeria, Pakistan, Papua New Guinea, Rwanda, Sierra Leone, †South Africa, †Sri Lanka, Sudan, Tanzania, Uganda, Ukraine, Uzbekistan, Vietnam, Zambia, Zimbabwe. Low GDP per capita membership fee £35 | UK & Channel Isles – £5.58 per month or £67 per annum |
| | International* £50 |
| Study options and revision aids | Refer to page 13 for a full listing |
| Exam entry fees – applicable in respect of exams sat prior to 01.01.09 | |
| Non-UK For exam entries received after the normal closing date, up to two weeks before the session, the normal fee is payable together with a late entry fee of £69 per unit. This is subject to space being available at the exam centre. Note: Candidates living outside the UK who are members of an associated or affiliated institute may enter for CII exams and purchase study materials at the same prices as those charged to members of the CII. | Fee per unit |
| | Member £83 Non-member £113 |

| Accreditation of prior learning | | |
|---|---|----------------------|
| <p>A fee is payable for each individual credit awarded in respect of prior learning that you have undertaken outside of CII qualifications.</p> <p>This is payable once the credits have been awarded. See page 12 for full details on the accreditation of prior learning.</p> | Fee per credit | |
| | Member £3 | Non-member £4 |
| Change of session, unit or centre fee | | |
| <p>UK</p> <p>Changes must be requested at least 21 days before the date of the exam for which you have entered. Multiple changes will be covered by a single fee provided they are submitted together.</p> <p>Non-UK</p> <p>Changes must be requested before the relevant closing date for exam entry at normal fee. Multiple changes will be covered by a single fee provided they are submitted together.</p> <p>An additional upgrade fee will be payable if you wish to change your exam entry to a Diploma or Advanced Diploma unit. Contact Customer Service for confirmation of the applicable fee.</p> | Change after entry £36 | |
| Refunds | | |
| <p>UK</p> <p>Cancellation of an exam entry at least 21 days before the date of the exam for which you have entered:</p> <p>Absence from exam with medical evidence (to be received within two months of the date of the exam):</p> <p>Non-UK</p> <p>Cancellation of an exam entry before the final closing date at normal fee:</p> <p>Absence from exam with medical evidence (to be received within two months of the date of the exam):</p> | <p>50% of exam entry fee</p> <p>50% of exam entry fee or free entry</p> <p>50% of exam entry fee</p> <p>50% of exam entry fee or free entry to the next session</p> | |

Contacting the CII

The CII is committed to delivering a first-class service to its members and customers and, to this end, we welcome feedback on any aspect of your relationship with our organisation. Please forward any views you may have on the service you receive, whether they are positive or otherwise. We take all such comments seriously, answer them individually and use them to help ensure that we continually improve the service we provide.

If you have any queries regarding the Certificate in Insurance or on any other service provided by the CII please contact Customer Service by calling, emailing or writing to us at:

Customer Service

42 - 48 High Road, South Woodford, London E18 2JP

tel: +44 (0)20 8989 8464

fax: +44 (0)20 8530 3052

email: customer.serv@cii.co.uk

Optional route for further study

Candidates completing the Certificate in Insurance may wish to consider the following:

Diploma in Insurance

The Diploma in Insurance is a technical qualification for insurance staff working across all sectors of the industry. It has been developed to provide a firm grounding in insurance practice and to build more advanced technical knowledge.

Importantly, successful Certificate candidates possess at least 40 of the 110 credits required in order to complete this. In the development of the Diploma, care has been taken to provide coverage of the full range of insurance topics, ranging from the fundamentals of insurance practice and legislation through to personal lines product families, classes of commercial insurance and specialisms such as risk management and marine.

The Diploma is modular in structure, with candidates able to select units of study according to their preference and career requirements. Each unit has a credit value and the accumulation of at least 110 credits at the stipulated levels leads to the award of the Diploma and entitles the holder to apply to use the designation 'Dip CII®' (CII membership and Continuing Professional Development requirements apply). Successful candidates also have credits that count towards study for the Advanced Diploma in Insurance.

Full details on the Diploma, together with information on the CII's full range of qualifications and services are available online at www.cii.co.uk or from Customer Service.

Entering for the Certificate in Insurance: Important information

Accreditation of prior learning

You need only read this if applying for accreditation of learning that you have undertaken outside of the CII.

Credits for prior learning can be awarded by the CII if it is satisfied that the syllabus for a CII unit has been substantially covered (a minimum 80% syllabus match) by a specific external qualification offered by a particular awarding body and has been assessed using a technique (70% of the assessment should be exam-based) and at a standard comparable with those applied to the Certificate, Diploma or Advanced Diploma unit in question.

Consideration can be given to alternative methods of assessment used in an external qualification, on condition that the level and standard remains acceptable to the CII.

If you hold a qualification which you think might provide the basis for an award of credits, you should complete the 'Individual prior learning accreditation' form at the back of this brochure. You can apply for this at any stage in your studies. You should check the syllabus of the unit(s) in respect of which you might gain credits. Do this before ordering a unit study text as you cannot change the book if you subsequently apply for, and are granted, credits.

You should appreciate that most units have, by their very nature, a strong insurance content and, to avoid disappointment, you should be realistic as to your credit expectations.

If accreditation has been established for your qualification, your eligibility will be checked and credits granted accordingly. If you are the first candidate to seek accreditation for a particular qualification you will be sent details of the information the CII needs to decide on the credit rating. You should send a note of these details to the awarding body.

You should note that, irrespective of how many credits your qualifications might provide, there is an overriding rule that you must enter and pass at least one unit from the Certificate in Insurance in order to be awarded this qualification.

Every new accreditation is carefully considered, so there may be a delay while information is being collated by the external body and appraised by the CII. You can start studying for the Certificate, but you should avoid entering a unit in respect of which you consider an award of credits a possibility.

If you fail an exam and subsequently gain an external qualification that would make you eligible for accreditation in respect of that unit, you are allowed to claim the credits.

Note: Credits in respect of any CII exams passed will automatically be added to your CII 'Learning Account'.

Entering for the Certificate in Insurance

All the information that you need is given in the following notes. We strongly urge you to read these to avoid error and resultant delay in the processing of your application. If you have any questions on anything in these notes or while completing the application form please contact Customer Service.

CII membership

1. If you are not already a CII member, you can become a member when you apply for the Certificate. Membership of the CII is open to anyone wholly/mainly employed or engaged in work connected with insurance. If you wish to apply for membership and it is not clear from your application form that you work in insurance, please provide brief details of the nature of your work and the proportion of your time spent on insurance matters on a separate sheet of paper.
2. Membership status may be disclosed to your employer unless you indicate otherwise in Section E of the application form.

Membership fees

3. The membership fees payable are shown in the 'Costs, fees and refunds' section on page 15.
4. We include a range of payment options which are detailed on the form. When using these please make sure that you clearly select one of the methods of payment and sign and date the declarations.

It is recommended that all members who have a UK current account should pay their membership by monthly direct debit.

Local institutes

5. If you apply for CII membership and live in the UK, the Channel Islands or the Isle of Man you will become a member of one of CII's local institutes. Please ensure that you select your preferred location from the list provided below and enter the relevant name in the space provided on the application form.

List of local institutes:

Aberdeen; Bedford & Milton Keynes; Belfast; Birmingham; Blackburn & Burnley; Bolton; Bournemouth; Bradford; Brighton; Bristol; Cambridge; Cardiff; Carlisle; Chelmsford & S Essex; Cheltenham & Gloucester; Chester & North Wales; Coventry; Croydon; Edinburgh; Exeter; Folkestone, Canterbury & E Kent; Glasgow; Guernsey; Guildford; Halifax; Harrow & Ealing; Hull; Inverness, the Highlands & Islands; Ipswich, Suffolk & N Essex; Isle of Man; Jersey; Kendal; Leeds; Leicester; Lincoln; Liverpool; London; Luton & St Albans; Manchester; Mid Kent; Middlesbrough; Newcastle-upon-Tyne; Northampton; Norwich; Nottingham; Perth & Dundee; Peterborough; Plymouth; Preston & Blackpool; Reading; Royal Tunbridge Wells; Sheffield; Shropshire & Mid Wales; Southampton; Stoke-on-Trent; Stratford-upon-Avon; Swansea & West Wales; Swindon; Truro; Watford; York.

The area covered by the Insurance Institute of London (IIL) is defined as all London postal districts except the following: N9, N11, N14, N21, NW9, E4, E6, E7, E10, E11, E12, E13, E15, E16, E17, E18, W3, W4, W5, W6, W7, W12, W13, SW20, SE20, SE25. There is an additional subscription fee for IIL members of £3.

Associated or affiliated institutes

6. If you live in an area where an associated or affiliated institute is established (see below) you should apply to the secretary of the institute concerned for details of local membership. Addresses can be obtained from Customer Service.

Individuals living outside the UK who are members of an associated or affiliated institute may enter CII exams and purchase study materials at the same prices as those charged to members of the CII.

Associated institutes:

Ireland (Cork, Dublin, Dundalk, Galway, Limerick, Sligo).

Note: Candidates who are members of the Insurance Institute of Ireland should submit all application forms to the **Insurance Institute of Ireland, 39-45 Molesworth Street, Dublin 2**, in order to be registered for all exams and tuition. If your application is sent directly to the CII it will be returned with a request that you forward it to the Insurance Institute of Ireland.

Overseas affiliated institutes:

Australia & New Zealand (Australian Capital Territory; New Zealand {Auckland}; New South Wales; Northern Territory; Queensland; South Australia; Tasmania; Victoria; Western Australia); Bahamas; Barbados; Bermuda; Botswana; Canada (Ontario; Quebec); Republic of China; Cyprus; Egypt; United Arab Emirates; Fiji; France (Bordeaux); Germany; Ghana; Guyana; Hong Kong; India (Mumbai; Hyderabad); Indonesia; Jamaica; Kenya; Malawi (Blantyre; Lilongwe); Malaysia; Mauritius; Namibia; Netherlands (Rotterdam; Utrecht); Nigeria; Pakistan; Papua New Guinea; Philippines; Poland (Warsaw); Saudi Arabia (Riyadh); St Lucia; Singapore; South Africa (Cape of Good Hope; Drakensberg; East Rand; Eastern Cape; Free State; Gauteng {Johannesburg}; Natal; Northern Gauteng {Pretoria}; Northern Province {Pietersburg}; The Border {East London}, The Lowveld); Sri Lanka; Tanzania; Trinidad & Tobago; Turks & Caicos; Uganda; West Africa (The Gambia); Zambia (Copperbelt {Ndola}; Kitwe; Lusaka); Zimbabwe (Bulawayo; Harare).

Study options, revision aids and exam entry fees

7. Details of all study options and revision aids are included on the application form. Exam fees can be found on page 15. Payment should be made by one of the methods shown on the form.

All remittances must be in Sterling. Cash should only be sent by registered post. Note: no liability can be accepted by the CII for cash sent via post.

Payment from countries outside the UK must be made by banker's draft payable in Sterling to the CII drawn on a UK bank or by credit/debit card (Visa, MasterCard, Switch/Maestro, Solo or Delta).

The charging of fees to your card does not in itself guarantee entry to the exam. An acknowledgement will be sent when your application form has been processed.

Tuition materials

- You should be aware that ordering a study course does not enter you for the corresponding exam.
- You should purchase the study text which is appropriate for the period during which you plan to sit the exam.

Exam entry

- There are different exam application procedures for UK and non-UK entries. However, in all instances, places will be allocated on a "first come, first served" basis.

UK

If you wish to sit Certificate exams in the UK you can either enter online at www.cii.co.uk or alternatively call Customer Service. See page 7 for an outline of how this process works.

Non-UK

If you are planning to sit an exam outside of the UK you can enter in the same manner as UK candidates, as detailed above, or by using the application form at the back of this brochure.

When using the application form, choose the exam centre you wish to attend from the list provided below and write the name and code in the space provided.

It is planned that all centres will be available in April and October.

International Centres

| Centre | Code | | |
|---------------------|------|--------------------|-----|
| Argentina | | Munich | 594 |
| Buenos Aires | 685 | Nicosia | 501 |
| Azerbaijan | | Oslo | 502 |
| Baku | 608 | Paris | 503 |
| Australia | | Riga | 701 |
| Perth | 507 | Sofia | 417 |
| Sydney | 526 | Valetta | 535 |
| Bahamas | | Warsaw | 700 |
| Freeport | 570 | Gambia | |
| Nassau | 498 | Banjul | 600 |
| Bahrain | 414 | Ghana | |
| Bangladesh | | Accra | 401 |
| Dhaka | 440 | Hong Kong | 457 |
| Belize | | India | |
| Belize City | 577 | Chennai | 481 |
| Bermuda | | Delhi | 442 |
| Hamilton | 456 | Hyderabad | 724 |
| Botswana | | Kolkata | 727 |
| Gaborone | 618 | Mumbai | 422 |
| Brazil | | Indonesia | |
| Rio de Janeiro | 514 | Jakarta | 443 |
| Brunei | | Iran | |
| Bandar Seri Begawan | 633 | Tehran | 560 |
| Canada | | Israel | |
| Toronto | 531 | Tel Aviv | 529 |
| Vancouver | 536 | Japan | |
| China | | Tokyo | 546 |
| Beijing | 670 | Kazakhstan | |
| Changsha | 636 | Almaty | 712 |
| Shanghai | 671 | Kenya | |
| Shenzhen | 726 | Mombasa | 490 |
| Colombia | | Nairobi | 497 |
| Bogota | 421 | Korea | |
| Egypt | | Seoul | 627 |
| Cairo | 427 | Kosovo | 721 |
| Eire | | Malawi | |
| Cork | 302 | Blantyre | 548 |
| Dublin | 301 | Lilongwe | 615 |
| Galway | 304 | Malaysia | |
| Limerick | 303 | Kuala Lumpur | 472 |
| Sligo | 306 | Mauritius | |
| Eritrea | 710 | Port Louis | 510 |
| Ethiopia | | Mexico | |
| Addis Ababa | 402 | Mexico City | 488 |
| Europe | | Middle East | |
| Amsterdam | 409 | Abu Dhabi (UAE) | 609 |
| Athens | 411 | Amman (Jordan) | 408 |
| Barcelona | 557 | Beirut | 675 |
| Berne | 568 | Doha (Qatar) | 617 |
| Brussels | 425 | Dubai (UAE) | 547 |
| Cologne | 448 | Kuwait | 475 |
| Copenhagen | 438 | Muscat (Oman) | 587 |
| Gibraltar | 452 | New Zealand | |
| Helsinki | 705 | Auckland | 412 |
| Kiev | 405 | Nigeria | |
| Lisbon | 563 | Ibadan | 459 |
| Lviv | 708 | Lagos | 476 |
| Madrid | 482 | Zaria | 581 |
| Milan | 489 | Pakistan | |
| Moscow | 649 | Islamabad | 718 |
| | | Karachi | 468 |
| | | Lahore | 477 |
| | | Paraguay | 723 |
| | | Peru | |
| | | Lima | 542 |

| | | | |
|---------------------|-----|------------------------------|-----|
| Philippines | | Uganda | |
| Manila | 484 | Kampala | 465 |
| Romania | | Uruguay | |
| Bucharest | 706 | Montevideo | 703 |
| Rwanda | | USA | |
| Kigali | 415 | Chicago | 435 |
| St Lucia | | New York | 500 |
| Castries | 595 | Philadelphia | 704 |
| Saudi Arabia | | Washington | 538 |
| Dammam | 407 | Uzbekistan | |
| Jeddah | 553 | Tashkent | 709 |
| Riyadh | 572 | Venezuela | |
| Seychelles | | Caracas | 432 |
| Singapore | 607 | Vietnam | |
| Sierra Leone | | Ho Chi Minh City | 711 |
| Freetown | 449 | West Indies/Caribbean | |
| South Africa | | Bridgetown (Barbados) | 423 |
| Cape Town | 431 | Georgetown (Guyana) | 451 |
| Johannesburg | 463 | Grand Cayman | 597 |
| Sri Lanka | | Grand Turk | 702 |
| Colombo | 437 | (Turks & Caicos Islands) | |
| Sudan | | Kingston (Jamaica) | 471 |
| Khartoum | 469 | Port of Spain (Trinidad) | 511 |
| Swaziland | | St John's (Antigua) | 605 |
| Mbabane | 576 | Tortola | 404 |
| Taiwan | | (British Virgin Islands) | |
| Taipei | 527 | Zambia | |
| Tanzania | | Lusaka | 480 |
| Dar Es Salaam | 441 | Ndola | 499 |
| Thailand | | Zimbabwe | |
| Bangkok | 416 | Harare | 517 |
| Turkey | | | |
| Istanbul | 461 | | |

Changing your exam entry

UK entries

- If you wish to make changes to your entry, please contact Customer Service as soon as possible and in any event at least 21 days before the date of the exam for which you have entered. If you wish to change units, sessions or centres you must pay an administration fee of £36 (see page 16).
 - If you wish to cancel an entry for one or more units in the exams, you must send notice of cancellation to the CII at least 21 days before the date of the exam for which you have entered to receive a refund of 50% of the fee.
 - Within 21 days of the date of the exam for which you have entered no changes apart from your address or name (which must be supported by original or certified evidence) can be made to your exam entry. If you wish to withdraw at this stage you will not receive a refund except in the case of illness.
- ### Non-UK entries
- If you wish to make changes to your entry after you have sent it in, please contact Customer Service as soon as possible and in any event by the final closing date at normal fee for that session (see page 9). If you wish to change units, sessions or centres you must pay an administration fee of £36 (see page 16).
 - If you wish to cancel an entry for one or more units in the exams, you must send a notice of cancellation to the CII before the final closing date (at normal fee) to receive a refund of 50% of the fee.
 - After the final closing date (at normal fee) no changes apart from your address or name (which must be supported by original or certified evidence) can be made to your exam entry. If you wish to withdraw at this stage you will not receive a refund except in the case of illness.
 - If you wish to enter for a unit after the specified closing date at normal fee an additional late entry fee of £69 will be charged.

Results

- The CII reserves the right to publish exam results.
- Results may be disclosed to your employer unless you indicate otherwise in Section E of the application form.
- In no circumstances will a copy of your completed exam be returned to you.
- If you study for a CII examination through a college or training provider, the CII may disclose details of your results to them, unless you indicate otherwise in Section E of the application form.

General

22. When the CII has processed your application form, you will be sent confirmation of your entry. This will give your CII permanent identity number (PIN) which you should use at all times when you contact the CII.
23. You are advised to retain a copy of the completed application form in case there are any queries.

Copyright

24. All CII study materials are copyright. By placing an order you undertake to use the materials for your own purposes only and not to sell, lend or give them to anyone else. Any form of copying of materials is prohibited. From the date of receipt by the CII of your order please allow ten days within the UK or twenty one days outside the UK for delivery of materials. Materials sent within the UK require a signature; please ensure that there will be someone to accept delivery at the address shown on the form.

Your right to cancel

25. In accordance with the Consumer Protection (Distance Selling) Regulations 2000 you have the right of cancellation in respect of the Products and Services, listed in this brochure, which right shall (subject to the Regulations) expire seven working days from the day after the date on which either the products are received by you or your order for services is accepted by the CII. Should you wish to cancel, notice should be sent to Customer Service. Where products have been supplied to you prior to such cancellation they must be returned to the CII, in the condition in which they were supplied to you, at your expense. Reimbursement for any monies paid by you which relate to the cancellation will be sent to you within 30 days of receiving the notice of cancellation or if products are to be returned to the CII, within 30 days of their receipt. In the event of less than seven days notice of cancellation being given in respect of an exam entry and if, where applicable, the CII is unable to recover costs suffered as a result of such short notice cancellation then the CII can recover these costs from you.

Additional terms and conditions

26. Please note there are additional terms and conditions which apply to candidates entering for exams with the CII. They relate in the main to entering for and sitting exams and the subsequent issue of exam results. Please note that in entering for the Certificate you agree to be bound by these additional terms. Full details can be found at www.cii.co.uk/notestoexams

Fairness, integrity and the CII appeals procedure

27. The CII is committed to giving all qualification candidates an equal opportunity of achieving these in line with current UK and EU Directives. It is also committed to open and fair processes and as part of this process runs a transparent appeals policy. Further details on the appeals policy can be found at www.cii.co.uk/notestoexams

Once you have read the notes on completing your application, you can either:

- complete and submit your form online at www.cii.co.uk
- phone through your order to Customer Service on +44 (0)20 8989 8464 ensuring that you have your credit/debit card details ready
- complete the form below and post or fax (+44 (0)20 8530 3052) to Customer Service.

Certificate in Insurance Application form

ICI002 (10/07)

Important note: To ensure that your application is processed correctly can you please enter your name at the top of each page in the space provided.

Section A – Personal details (Please complete all fields. Your name should be entered as you wish it to appear on your certificate.)

Have you ever had previous contact with the CII? Yes No (Please tick)

Please give your CII permanent identity number (PIN) if known

PIN

Mr/Mrs/Miss/Ms Surname

Forenames Date of birth

Employer's name

Tel Ext Mob

email*

Work address

Postcode Country

Home address

Postcode Country

* Please take care when providing your email address as most correspondence will be sent electronically.

Tick address to be used for correspondence Home Work

Please only tick one box per category

Type of organisation Insurance company Broker/Intermediary Lloyd's Reinsurance company/broker
 Loss adjuster/Loss assessor Bank/Building Society Consultancy Legal
 Other

Area of work Underwriting Claims/Loss adjusting Broking Sales/Marketing
 Risk management/Surveying Administration/Processing Compliance HR/Training
 Finance Other

Job category Administrative Technical Advisory Supervisory/Controller
 Middle management (Branch, Office, Dept) Senior management (General, Head of) Executive (CEO, Director) Business owner
 Other

Is your employer a member of a network or does it work with a compliance services provider? Yes No

If yes, please specify

Study path

Where you are studying in order to complete a qualification please indicate which by ticking the appropriate box:

Certificate in Insurance Diploma in Insurance Advanced Diploma in Insurance

Certificate in Insurance application form – ICI002 (10/07)

Enter your name

Section B – CII membership (Please ONLY complete this section if you are applying for membership. Go to Section C if you are already a member.)

Important note: applying for membership now entitles you to the reduced member rates for study materials and exam entry shown in Sections C and D.

I wish to apply for membership of the CII Yes No (Please tick as appropriate)

I wish to join the following local institute – UK only (See pg 18)

Have you ever been convicted of, or charged with (but not yet tried for), any offence other than minor motoring offences? Yes No

If yes, please attach a separate letter giving details. You are required to let the CII know if you are convicted of any offence other than minor motoring offences in the future.

Faculties

Please choose below which faculty you would like to join. These are forums of the CII which provide a range of services in support of individuals working in specific industry sectors – further information can be found at www.cii.co.uk/faculties

In applying for CII membership **you can join one faculty for free**. If you wish to join additional faculties please contact CII Customer Service on +44 (0)20 8989 8464.

(Select one)

Insurance Broking

Claims

London Market

Underwriting

(For general insurance company employees)

Life & Pensions

Please note: You can only join a faculty if you are applying for membership or are already a member

Membership fees

1. An admission fee of £36 is payable by **ALL** applicants.

2(a). Please then select the appropriate member fee:

| | London only* | UK and Channel Isles | International** |
|----------------------|--------------|----------------------|-----------------|
| Annual subscription | £70 | £67 | £50 |
| Monthly Direct Debit | £5.83 | £5.58 | n/a |

Important notes: * This includes a £3 subscription fee for membership of the Insurance Institute of London.

** A discounted membership fee is available for individuals resident in countries categorised as 'low GDP per capita'. See page 16 for details.

2(b). Choose the method of payment. This can either be:

- by monthly Direct Debit. If you choose this option do not complete the sub total box, but fill out the Direct Debit form at the back of this application form. The admission fee will be added to the first month's payment.
- by cheque or debit/credit card. If you choose this option please enter the correct amount in the sub total box, including the admission fee where appropriate.

Sub total £

Section C – Study options and revision aids

I wish to order the following learning materials (please ensure you enter the unit code)

| * Study options | CII use | Member | Non-member | Unit code | | | Total |
|---------------------------|---------|--------|------------|----------------------|----------------------|----------------------|-------|
| Correspondence course | PT | £145 | £172 | <input type="text"/> | <input type="text"/> | <input type="text"/> | £ |
| Study text | UD | £99 | £116 | <input type="text"/> | <input type="text"/> | <input type="text"/> | £ |
| Study text update service | | £45 | £56 | <input type="text"/> | <input type="text"/> | <input type="text"/> | £ |
| Upgrade service | | £46 | £56 | <input type="text"/> | <input type="text"/> | <input type="text"/> | £ |

Sub total £

Certificate in Insurance application form – ICI002 (10/07)

Enter your name

Section C – Continued

| *Revision aids | CII use | Member | Non-member | Unit code | | | Total |
|--------------------------------|--|--------|------------|-----------|--|--|-------|
| Examination guides | available online at www.cii.co.uk | | | | | | |
| Key facts booklets | KF | £21 | £23 | | | | £ |
| Winning the brain game | WB | £28 | £28 | | | | £ |
| ed.LEARN online tutorial | available at www.ed.cii.co.uk | | | | | | |
| Computer based training CD-ROM | CBT | £72 | £72 | | | | £ |
| **Revision days (See pg 15) | R | £170 | £195 | | | | £ |
| | Date | | | Venue | | | |

Sub total £

Important notes:

Materials sent within the UK require a signature; please ensure there will be someone to accept delivery at the specified address shown on the form. Please note we do not deliver to PO Box addresses in the UK.

- * With the exception of training courses all prices apply from 01 October 2007 to 31 December 2008.
- ** Prices shown for training courses apply from 01 January 2008. For training courses in 2007, please use a 2007 booking form, available online at www.cii.co.uk or from Customer Service. All course bookings are made on the terms and conditions listed within the Training Directory.

Postage fee (not applicable to training courses):

UK and EU £4 per order.

All other countries £14 per study option and £8 per revision aid purchased.

Postage fee £

Section D – Non-UK exam entry

Only complete this section if you are applying to sit Certificate in Insurance exams outside of the UK.

If you are intending to sit an exam in the UK you must enter online at www.cii.co.uk or by calling Customer Service.

I wish to enter the following exams at the centre in:

Centre location

Centre code

2008 exam dates
(please tick required dates)

| Unit | Apr | Oct | Member* | Non-member* | Total |
|---|-----|-----|---------|-------------|-------|
| (IF1) Insurance, legal and regulatory | | | £83 | £113 | £ |
| (IF2) General insurance business | | | £83 | £113 | £ |
| (IF3) Insurance underwriting process | | | £83 | £113 | £ |
| (IF4) Insurance claims handling process | | | £83 | £113 | £ |
| (IF5) Motor insurance products | | | £83 | £113 | £ |
| (IF6) Household insurance products | | | £83 | £113 | £ |
| (IF7) Healthcare insurance products | | | £83 | £113 | £ |
| (IF8) Packaged commercial insurances | | | £83 | £113 | £ |

Sub total £

Additional late entry fee (See pg 15)

£

Once you have read the notes on the accreditation of prior learning, complete the form below and post to Customer Service.

Certificate in Insurance Individual prior learning accreditation form

ICI002 (10/07)

Only complete this form if you are applying for credits for non CII exams. Credits for CII exams will automatically be added to your 'learning account.'

Important note: To ensure that your application is processed correctly can you please enter your name at the top of each page in the space provided.

Section A – Personal details (Please complete all fields. Your name should be entered as you wish it to appear on your certificate.)

Have you ever had previous contact with the CII? Yes No (Please tick)

Please give your CII permanent identity number (PIN) if known PIN

Mr/Mrs/Miss/Ms Surname

Forenames Date of birth

Employer's name

Tel Ext Mob

email*

Work address

Postcode Country

Home address

Postcode Country

*** Please take care when providing your email address as most correspondence will be sent electronically.**

Tick address to be used for correspondence Home Work

Please only tick one box per category

Type of organisation Insurance company Broker/Intermediary Lloyd's Reinsurance company/broker
 Loss adjuster/Loss assessor Bank/Building Society Consultancy Legal
 Other

Area of work Underwriting Claims/Loss adjusting Broking Sales/Marketing
 Risk management/Surveying Administration/Processing Compliance HR/Training
 Finance Other

Job category Administrative Technical Advisory Supervisory/Controller
 Middle management (Branch, Office, Dept) Senior management (General, Head of) Executive (CEO, Director) Business owner
 Other

Is your employer a member of a network or does it work with a compliance services provider? Yes No

If yes, please specify

“

Quote go go here

”

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Ref: CII – ICI002 (10/07)