

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

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

Certificate in Mortgage Advice Application form

ICF009 (10/06)

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 Mortgage intermediary Network Packager Independent financial adviser
 Estate agent Accountant Insurance broker Bank
 Building Society Specialist lender Insurance company Other

Area of work Advising clients Underwriting Administration/Processing HR/Training
 Compliance Finance Product selling to advisers Technical adviser
 Other

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

Study path

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

Certificate in Mortgage Advice Diploma in Financial Planning Advanced Diploma in Financial Planning

Certificate in Financial Planning Certificate in Financial Planning and Lifetime Mortgage Activities

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Enter your name

Section B – Society of Mortgage Professionals/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.

I am a non-member and wish to apply for membership of the Society of Mortgage Professionals/CII Yes No

- I wish to join the following local institute – UK only (See pg 15)
- 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.

I am an existing member of either the CII or Personal Finance Society and wish to join the Society of Mortgage Professionals as a member for free

Membership fees

- An admission fee of £36 is payable by **ALL** applicants – unless you are already a member of the CII or Personal Finance Society and are only applying for Society of Mortgage Professionals membership.
- (a). Please then select the appropriate member fees:

	London only*	UK and Channel Isles
SMP/CII annual subscription	£70	£67

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

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

- by 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.**
- 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
Coursebook and update service	UD	£59	£69	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
Coursebook only	TB	£32	£37	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
Update service beyond year one	TB	£29	£34	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
Upgrade service: (See pg 10 for option and pricing)		£27	£32	<input type="text"/>	<input type="text"/>	£ <input type="text"/>

Sub total

* Revision aids	CII use	Member	Non-member	Unit code		Total
Examination guides	available online at www.cii.co.uk					
Key facts booklets	KF	£20	£22	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
Winning the brain game	WB	£27	£27			£ <input type="text"/>
Audio CD	CDCF1	£45	£52			£ <input type="text"/>
ed.LEARN online tutorial	available at www.ed.cii.co.uk					
Computer based training CD-ROM	CBT	£69	£69	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
** Intensive revision courses (CF1) (See pg 12)	IT	£825	£955			£ <input type="text"/>
	Date	<input type="text"/>				
** Revision workshops (CF6) (See pg 12)	WS	£445	£515			£ <input type="text"/>
	Date	<input type="text"/>				
** Revision days (See pg 12)	RD	£170	£195	<input type="text"/>	<input type="text"/>	£ <input type="text"/>
	Date	<input type="text"/>		Venue	<input type="text"/>	

Sub total

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Enter your name

Section C – Continued

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.

* With the exception of training courses all prices apply from 01 October 2006 to 30 September 2007.

** Prices shown for training courses apply from 01 January 2007. 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 – Exam entry

To enter for a Certificate exam you need to go online at www.cii.co.uk or call Customer Service.

Section E – Total payable and method of payment

Insert the total value of all items ordered in Sections B and C.

TOTAL PAYABLE

Note: All prices quoted are inclusive of VAT, where appropriate, at the current rates. Prices are subject to change without notice.

(NOTE: Please ensure that where applicable you have included the appropriate postage fee – see Section C.)

Tick method of payment and, if applicable, complete the card details.

Cash/cheque payable to the Chartered Insurance Institute, and drawn on a UK bank, enclosed. Your name and permanent identity number (PIN) or address must be written on the back of the cheque.

Credit/debit card: Please debit my/our account with the total cost of the goods and services ordered on this form, according to the CII's prices at the time of processing.

Type of card (please tick) VISA MASTERCARD DELTA SWITCH/MAESTRO SOLO

Valid from* | | | Expiry date* | | | Issue number* |

Card number*

*Please complete according to the information on your credit/debit card.

Cardholder's name and address if different from personal details

Cardholder's signature

Date

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Enter your name

Section F – Declarations

Application for study materials

I undertake to use them for my own purposes and not to sell, copy, lend or give them to anyone else.

Membership

In applying for admission to membership of the CII, I agree to abide by the Charter, Bye-laws and Code of Ethics and Conduct of the Institute, and by the constitution and Bye-laws of any local institute of which I may become a member.

Exam prizes

Organisations other than the CII sponsor prizes and awards based on CII exam performance. If you do not wish any information to be passed on to these organisations, please tick this box.

Terms, conditions and cancellation

I have read and agree to the terms and conditions contained in this brochure, including my right of cancellation.

Data Protection and Privacy

The CII is registered under the Data Protection Act 1998 and will ensure that in providing products and services to you, it will process your personal data fairly. Where your employer pays for any of your tuition including e-learning, examination entries, coursebooks or membership fees, the CII will upon the employer's request provide your employer with details of your membership status and/or examination record including attempts, unless you tick this box.

We may from time to time wish to draw your attention to other CII products and services which are likely to be of interest to you. We may also share your data with third parties who will use this for similar purposes, but will never sell your personal data to third parties. The CII will assume that you consent to us using your data in this way unless you tick the following box.

Signed

Date

Important note: Please allow 10 days for delivery in the UK and 21 days outside the UK from receipt of your correctly completed application form.

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.

Study options and revision aids are provided by the Education and Training Trust of the Chartered Insurance Institute (a company limited by guarantee)

Registered office: 20 Aldermanbury, London EC2V 7HY. Registered Charity no. 1021017

Please fax the completed form if paying by credit/debit card on +44 (0)20 8530 3052 or send with your cheque to **Customer Service, CII, 42 - 48 High Road, South Woodford, London E18 2JP**