

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

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

Face-to-Face Training Booking form

FTF001 (11/05)

Please complete in BLOCK CAPITALS (one form per delegate; please photocopy this form for additional bookings)

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)

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 Fax

email

Work address

Postcode Country

Home address

Postcode Country

Tick address to be used for correspondence Home Work

Please only tick one box per category

Type of organisation

- Insurance
- | | | | |
|--|--|----------------------------------|--|
| <input type="checkbox"/> Insurance company | <input type="checkbox"/> Broker/Intermediary | <input type="checkbox"/> Lloyd's | <input type="checkbox"/> Loss adjuster/Loss assessor |
| <input type="checkbox"/> Bank/Building Society | <input type="checkbox"/> Consultancy | <input type="checkbox"/> Legal | <input type="checkbox"/> Reinsurance company/broker |
| <input type="checkbox"/> Other | | | |

- Financial Services
- | | | | |
|--|--|--|---|
| <input type="checkbox"/> Independent financial adviser | <input type="checkbox"/> Independent financial adviser – Network | <input type="checkbox"/> Whole of market | <input type="checkbox"/> Multi-tied |
| <input type="checkbox"/> Tied agent (Sole agent) | <input type="checkbox"/> Company (insurer/assurer) | <input type="checkbox"/> Bank/Building Society | <input type="checkbox"/> Mortgage adviser |
| <input type="checkbox"/> Investment house | <input type="checkbox"/> Other | | |

Area of work

- Insurance
- | | | | |
|--|--|-------------------------------------|--|
| <input type="checkbox"/> Underwriting | <input type="checkbox"/> Claims/Loss adjusting | <input type="checkbox"/> Broking | <input type="checkbox"/> Sales/Marketing |
| <input type="checkbox"/> Risk management/Surveying | <input type="checkbox"/> Administration/Processing | <input type="checkbox"/> Compliance | <input type="checkbox"/> HR/Training |
| <input type="checkbox"/> Finance | <input type="checkbox"/> Other | | |

- Financial Services
- | | | | |
|--|---------------------------------------|----------------------------------|--|
| <input type="checkbox"/> Advising clients | <input type="checkbox"/> Underwriting | <input type="checkbox"/> Claims | <input type="checkbox"/> Administration/Processing |
| <input type="checkbox"/> HR/Training | <input type="checkbox"/> Compliance | <input type="checkbox"/> Finance | <input type="checkbox"/> Product selling to advisers |
| <input type="checkbox"/> Technical adviser | <input type="checkbox"/> Other | | |

Job category

- | | | | |
|---|---|--|---|
| <input type="checkbox"/> Administrative | <input type="checkbox"/> Technical | <input type="checkbox"/> Advisory | <input type="checkbox"/> Supervisory/Controller |
| <input type="checkbox"/> Middle management (Branch, Office, Dept) | <input type="checkbox"/> Senior management (General, Head of) | <input type="checkbox"/> Executive (CEO, Director) | <input type="checkbox"/> Business owner |
| <input type="checkbox"/> Other | | | |

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Enter your name

Section A – (continued)

If you are booking for someone please give a contact name:

Contact name
Job title
Tel Ext Fax
email

Section B – CII membership (please ONLY complete this section if you are applying for membership)

Important note: applying for membership now entitles you to the reduced member rates for courses you are applying for in section C.

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 82)

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/faculties 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**, with a £10 fee applying for each additional faculty you select.

	Free (Select one)	£10 (per additional faculty)
Insurance Broking	<input type="checkbox"/>	<input type="checkbox"/>
Claims	<input type="checkbox"/>	<input type="checkbox"/>
London Market	<input type="checkbox"/>	<input type="checkbox"/>
Underwriting & Risk * <small>(For general insurance company employees)</small>	<input type="checkbox"/>	<input type="checkbox"/>
Life & Pensions*	<input type="checkbox"/>	<input type="checkbox"/>

* To be launched in 2006

Membership fees

1. An admission fee of £35 is payable by **ALL** applicants.

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

	London only*	UK and Channel Isles	International**
Annual subscription	£68	£65	£46

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 point 6. on page 82 for details.

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 admission fee and faculty fees where appropriate.**

Sub total

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Enter your name

Section C – Course reservation

I wish to book the following course(s)

Course title

Venue

Date

Sub total

£

Course title

Venue

Date

Sub total

£

Course title

Venue

Date

Sub total

£

Section D – Total payable and method of payment

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

TOTAL PAYABLE

£

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

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.
- Invoice (for corporate customers only, available by arrangement, please contact Customer Service for details).

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 E – Declarations

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.

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 the 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

Training is 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

Guidance notes

1. You can elect to pay your annual membership subscription fee by Direct Debit, using this form.
2. The form authorises your bank to accept the Direct Debiting of your account.
3. Any changes in the membership rate will be subject to all the usual safeguards laid down in the Charter & Bye-laws.
4. You will be notified of the date and amount of collection at least 14 days before collection.
5. A one-off admission fee (£35) is charged for all membership applications.