

Proud to be Chartered



Special offer to apply for

Chartered Status



Chartered status counts

The financial services industry is arguably subject to more public scrutiny and official regulation than any comparable profession. Those working within it need to demonstrate their competence, commitment and integrity at every turn.

Which is why Chartered status, earned under the auspices of the CII, is so important.

A Chartered title shows the world that you have attained and maintain the highest and most prestigious level of professional achievement. It elevates you in the public eye to the same standing as other Chartered professionals, such as surveyors, engineers and accountants. Research* proves that consumers value and appreciate Chartered status. It provides comfort and security, serving as a benchmark for quality and ethical practice.

A Chartered title proves to employers that you have the knowledge, drive and passion needed to shine in a fast-moving, competitive industry.

The Chartered title family

There are four Chartered titles:

'Chartered Insurer' applies to qualified members working for insurance companies and Lloyd's underwriting agents.

'Chartered Insurance Practitioner' applies to qualified members who work as insurance intermediaries or loss adjusters, in trade and professional bodies and in other insurance-related occupations.

'Chartered Insurance Broker' applies to qualified members who are carrying on business as an insurance broker. An insurance broker is an intermediary who acts for clients and, in respect of any product type, can offer a choice of solutions.

'Chartered Financial Planner' applies to eligible members who are carrying on business as providers of financial planning advice, or related activities, to individuals or corporate entities. Eligible members must also have completed a period of not less than five years experience in the industry and are members of the Personal Finance Society. Please see Section C – Notes for further information.

Continuing professional development

All CII designatory titles, including Chartered are underpinned by a programme of continuing professional development (CPD). This ensures that members of the CII maintain the highest levels of technical knowledge and awareness, further enhancing their competence and professional standing.

To become a Chartered title holder you need to maintain your commitment to an ongoing programme of CPD. The CII's CPD scheme provides you with valuable support during your career, helping you to keep your knowledge up-to-date and supporting you in your professional development.

In many cases, new members find that their existing personal development activity satisfies the CPD requirements. The formal structure of the CII programme, which provides for efforts to be recorded and monitored usually by way of the CII's online tool, simply helps consolidate and accelerate the learning process.

Those applying for a Chartered title need to have completed three years CPD. The CII may ask applicants to demonstrate that they have met this requirement before granting a Chartered title.

Code of Ethics

All Chartered title holders adhere to the CII Code of Ethics. This strict professional and ethical code ensures that those with Chartered status conduct themselves in line with the highest standards.

Fees

The application fee has been waived but only until 31 August 2009. Set yourself apart now and become a Chartered title holder for FREE! The normal admission fee of £140 applies after this date.

Your current annual membership subscription will remain unchanged until your next renewal.

Applications

You must be at least at 'associateship level' to be able to apply for a Chartered title. Please see Section C – Notes for further information.

To apply for your Chartered title, please complete and return the application form. Alternatively, you can also call Customer Service on +44 (0)20 8989 8464 quoting offer code **MST 87**.

Section A – Personal Details (Please complete all fields.)

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

Mr/Mrs/Miss/Ms Surname

Forename Date of Birth

Home address

Postcode Country

Daytime tel Mobile

e-mail*

Job title

Employer's name

Work address

Postcode Country

* For every email address we receive, we will donate 10p towards Trees for Life reforestation programme in the Scottish Highlands. Visit www.cii.co.uk/amend for details.

Tick address to be used for postal correspondence Home Work

Section B – Declarations

I wish to apply to become:

Chartered Insurer Chartered Insurance Practitioner Chartered Insurance Broker Chartered Financial Planner

Membership status

I do not wish details of my membership status to be passed to my employer (tick if applicable)

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 (and its business associates) will process your personal data fairly. In addition to providing details of your membership status to your employer (unless you have requested otherwise), we may from time to time wish to share your data with third parties so that they can draw your attention to products and services which are likely to be of interest to you. We will never sell your personal data to third parties and will assume that you consent to us sharing your data in this way unless you tick the following box.

I consent to my name appearing within a Chartered Title Directory which may be made available to the public in hard copy as well as on the CII website, unless I tick the following box.

Your right to cancel

I recognise that in accordance with The Consumer Protection (Distance Selling) Regulations 2000 I have a right of cancellation in respect of Services, listed in this brochure, which right shall (subject to the Regulations) expire seven working days from the day after the date on which my order for services is accepted by the CII. In the event I wish to cancel I will send notice to Customer Service. I accept that reimbursement for any monies paid by me which relate to the cancellation will be sent to me within 30 days of CII receiving the notice of cancellation.

Have you ever been made bankrupt or been the subject of an individual voluntary arrangement (or any such analogous procedure) or been convicted of, or charged with (but not yet tried with), any offence other than a monetary fixed penalty for a motoring offence? Yes No

If yes please give details on a separate sheet of paper. You are required to let the CII know if you are made bankrupt, become the subject of an individual voluntary arrangement (or any such analogous procedure) or are convicted of any offence (other than a motoring offence with a monetary fixed penalty) in the future.

I hereby apply to use the Chartered title of the Institute according to my occupation within the industry. I confirm that I shall abide by the Charter, Bye-laws and Code of Ethics of the Institute and by the Constitution and Bye-laws of any local institute of which I am a member. I undertake to inform the Institute of any change in my occupation which would entail a change in the Chartered title. I have read and understood the regulations for the use of Chartered titles (Section C). I have undertaken three years' CPD in accordance with the CII rules and agree to submit evidence if requested (in cases of re-instatement the evidence must be submitted with this form). If at any time I cease to be a member of the CII, I undertake to return any certificate of membership.

Signed

Date

Section C – Notes

1. General regulations for the use of Chartered titles

Fellows and Associates of the CII group can apply provided they:

- (a) have five years' experience in the industry (not necessarily post-qualification) of a kind satisfactory to the Institute, and
- (b) in their examinations have passed such combination of subjects as may be specified from time to time by the CII or approved in any individual case by the CII, and
- (c) have completed three years' CPD in accordance with CII rules.

Chartered title holders should only use the title in an individual capacity. It should not be used in a manner applying to firms, partnerships or corporate bodies. The titles must be used in full without abbreviation.

Fellows and Associates whose applications are approved will be issued with a certificate of entitlement. Any Fellow or Associate holding such a certificate whose occupation or employment changes so as to cause them to cease to be eligible shall notify the CII and return their certificate. Such notification shall not be required in the event of a temporary period of unemployment. The CII may, at its discretion, issue an appropriate new certificate, or might require further details or a renewed application for this purpose.

All holders of certificates of entitlement must, as a condition of retaining such a certificate, comply with the Charter, Bye-laws and regulations of the CII and with the programme of continuing professional development operated by the CII. Inappropriate use of a title or failure to comply with the regulations in any respect may result in the forfeiture of the entitlement to use a title.

The CII will maintain a register of those holding certificates of entitlement and may monitor the use of titles in any manner it sees fit.

2. Specific regulations for use of Chartered Financial Planner

An individual will need to

- hold the Financial Planning Certificate or equivalent
- a minimum of 290 qualification credits which must include:
- completion of the Advanced Diploma in Financial Planning.

3. Notes for applicants to Chartered status

- These Chartered titles are available exclusively to members who have reached CII Associate level.
- Their use is conditional on due application to, and authorisation by, the CII.
- The application fee has been waived but only until 31 August 2009. The normal admission fee of £140 applies after this date.
- The annual membership subscription for Fellows and Associates who are granted a Chartered Insurer, Chartered Insurance Practitioner or Chartered Insurance Broker title will be £163. The annual membership fee for a Chartered Financial Planner title is £200.

The Chartered Insurance Institute 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

www.cii.co.uk

