



Certificate/Diploma/ Advanced Diploma in Insurance

2009 Information for candidates

Accelerating your
development as an
**insurance
professional**



CII

www.cii.co.uk

If you are new to the insurance or financial services industry or are progressing your studies, belonging to the Chartered Insurance Institute (CII) enables you to accelerate your career development.

As a CII member you can gain the competence, knowledge and understanding required to succeed.

Join as a member of the CII and enjoy extra benefits to support your studies

As a CII member you will enjoy:

Help in passing your exams

- Free access to an online archive of exam guides for written exams. For full details visit www.cii.co.uk/knowledge/examguides
- Access to copies of textbooks recommended for additional reading
- In depth, regularly updated online fact files to complement your coursebooks
- Online technical dictionaries to help you with unfamiliar terminology

Help in developing your career

- Industry recognised designatory letters – Cert CII®, Dip CII® and ACII® – available exclusively to qualified members on application, helping you to demonstrate your professionalism and 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

Discounts are available on learning materials, exams, seminars, study and revision days meaning membership may effectively 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.

In addition, if you pay by Direct Debit you will be able to spread the cost of payment from as little as £5.84 a month.

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

The CII is the premier professional body for those working in the insurance and financial services industry. The CII has over 93,000 members and has been at the forefront of setting professional standards for the insurance industry for over a century.

Membership of the CII is a positive step for anyone in the industry. As the No.1 professional organisation there is no better place to go to structure a successful career. Our increasing focus on insurance disciplines, through the CII faculties, makes it easy to identify relevant content that matches your role and helps you gain the edge in your chosen career.

To find out more about the full range of CII member services visit www.cii.co.uk/membership

JOIN as a member 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 93,000 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 understanding. 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 enhancing 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.

www.cii.co.uk



INVESTOR IN PEOPLE

Contacting the CII

If you have any queries regarding the qualifications in this brochure please contact Customer Service.

The CII is committed to delivering a first-class service 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.

Customer Service

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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 deliver a capable, professional service.

This brochure covers the Certificate, Diploma and Advanced Diploma in Insurance qualifications.

Certificate/Diploma/Advanced Diploma in Insurance

Certificate in Insurance

Building knowledge, developing core competence

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.

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.

On completion you will be entitled 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.

The Certificate in Insurance is appropriate for:

- 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.
- Staff taking an Apprenticeship or Advanced Apprenticeship in Retail Financial Services can use the CII's Certificate in Insurance units to meet the technical certificate requirement.

Diploma in Insurance

Enhancing technical knowledge and understanding

The Diploma in Insurance is a technical and supervisory qualification for insurance staff working across all sectors of the industry (and the logical progression from the Certificate in Insurance).

It will provide you with a firm grounding in insurance fundamentals and will enable you to build towards advanced technical knowledge, thereby ensuring you have the means to function effectively in a challenging environment.

In addition to being a valuable qualification in its own right, the Diploma can also be a milestone on the route to completion of the Advanced Diploma. In completing the Diploma you will have to complete at least one Advanced Diploma unit and will acquire a minimum of 110 credits that can also be used towards the Advanced Diploma (for which 290 are required in total).

The Diploma in Insurance is appropriate for:

- Insurance technicians and those who aspire to be technicians.
- Supervisors, team leaders and those with long-term ambitions of assuming managerial responsibilities.
- Anyone wishing to hold a recognised, respected insurance qualification.

- Insurance staff employed in support functions wishing to develop their knowledge of the business.
- Those wanting to develop their knowledge and understanding as part of a progression towards completion of the Advanced Diploma in Insurance and Chartered status.

Advanced Diploma in Insurance

Putting professionalism into practice

The Advanced Diploma in Insurance is a professional qualification for insurance staff working across all sectors of the industry (and the logical progression from the Diploma in Insurance). It provides an enhanced understanding of insurance practice, both in terms of technical subject matter and overall management skills.

The Advanced Diploma is a comprehensive assessment of market knowledge and understanding. In becoming Advanced Diploma qualified you join the community of proven insurance professionals. It is evidence of your purpose, commitment and ability. It can be your passport to a successful and fulfilling career.

The Advanced Diploma in Insurance is appropriate for:

- Today's insurance managers and technical specialists.
- Staff with aspirations to become managers in the future.

- Those employees who wish to demonstrate their professional standing.
- Insurance employees without another professional qualification and those who wish to build upon existing general academic qualifications, such as a degree, by obtaining an industry-specific qualification.

Flexible and comprehensive

As a Certificate, Diploma or Advanced Diploma candidate, you can select units from across the CII qualifications framework. This means you have access to the entire range of units currently available. They offer something for everyone, whatever sector of the insurance industry you work in and whatever your particular specialisation or preferred career path. These range 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.

All qualifications are 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, Diploma or Advanced Diploma. Successful completion allows you to apply to use the designations 'Cert CII®', 'Dip CII®' or 'ACII®' respectively (CII membership and Continuing Professional Development requirements apply).

From the Advanced Diploma you can apply for Chartered status (subject to having five years' experience, not necessarily post-qualification), with the CII's three Chartered titles reflecting your career specialism:

- Chartered Insurer®;
- Chartered Insurance Broker®; and
- Chartered Insurance Practitioner®.

Chartered status cements your professional standing and gives you parity with other professionals such as accountants and solicitors.

The CII also offers corporate Chartered status to qualifying firms of insurance brokers, further enhancing the visible professionalism of the broker sector. The eligibility criteria for corporate Chartered status includes a specified number of directors holding individual Chartered status in their own right.

As an individual, obtaining Chartered status can, therefore, deliver many advantages in terms of career and business advancement.

Meeting market expectations

Importantly, these qualifications have been designed to assist you and your employer to comply with both the existing and future regulatory training and competence requirements. The Financial Services Authority (FSA) requires you to demonstrate that you are competent in the work you do, and thereafter to maintain this competence. This approach is designed to ensure that you have the appropriate knowledge and skills to perform your job effectively. Qualifications can play an important role in helping to meet the requirements by serving as an objective measurement of your technical awareness and understanding.

Office of the Qualifications and Examinations Regulator (Ofqual)

Ofqual is the new regulator of qualifications, exams and tests in England. They are also the regulators for the recognised awarding bodies (such as the CII). For further information refer to the Ofqual website: www.ofqual.gov.uk

The Certificate in Insurance is accredited with Ofqual at Level 3 in the National Qualifications Framework. The Certificate is only accredited where it is completed using Certificate units IF1-IF8.

Selecting and entering for a qualification

Why a CII insurance qualification?

These qualifications can help your career in the following ways:

- Demonstrate to your employer, peers and customers your commitment to personal learning and development.
- Can form part of an overall programme to meet the regulator's training and competence requirements.
- Supports lifelong learning as prior study is recognised as you progress through the qualifications framework, taking accumulated credits with you.

- Supports personalised learning programmes as you select the topics most appropriate to your role, rather than follow a rigid pre-set learning pathway.
- A 'Record of Achievement' is awarded for each unit passed, providing portable and permanent evidence of learning undertaken.
- Certificate/Diploma/Advanced Diploma in Insurance awarded upon completion.

- Upon completion of these qualifications you can apply to use the corresponding designation. These are respected throughout the industry and increasingly acknowledged by the public as demonstrating professional standing (CII membership and Continuing Professional Development requirements apply).
- Advanced Diploma holders can apply to become Chartered title-holders.

Your next step

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

The following pages contain all the information you require to select the most appropriate study path. As you read through these, you will learn about the units on offer, the available learning materials, course and exam entry dates and deadlines, terms and conditions relating to entry, and the different ways you can enter.

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

Entry requirements

There are no entry requirements in order to study for these qualifications. However, we would recommend that in the case of the Diploma and Advanced Diploma candidates hold the following qualifications or their equivalent:

- Diploma – the Certificate in Insurance or 5 GCSEs grade C or equivalent.
- Advanced Diploma – the Diploma in Insurance or 3 A levels or equivalent.

Aside from the requirements set out below you are free to select units from across all the CII's insurance qualifications/study programmes: Award in Insurance, Certificate in Insurance, Diploma in Insurance and Advanced Diploma in Insurance.

This approach provides you with maximum flexibility, enabling you to choose units from those currently available across our qualifications. The advantage here is that someone still developing their study skills or subject to a particularly demanding work schedule can initiate or continue their studies by taking a larger number of lower level units. See the section headed 'Flexible learning options' on page 8 for full details.

Notes applicable to the Diploma and Advanced Diploma:

- Candidates may sit unit P04 and then progress to unit 530 or sit 530 instead of P04. However, it is not possible to sit 530 and subsequently to study P04 as this would represent a move backwards in terms of technical complexity. This rule also applies to anyone deemed to have passed 530 by virtue of accredited prior learning.
- The rules stated in the bullet point above also apply in respect of Diploma and Advanced Diploma units P86 and 760.
- Anyone with a previous pass in units P03 and/or 520 will have satisfied the legal unit requirement and will be precluded from taking P05.

Completion requirements

Certificate

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).

Diploma

To achieve the Diploma you must accumulate 110 credits, with at least 70 of these obtained at either Diploma or Advanced Diploma level and a minimum of 30 from an Advanced Diploma unit.

We would recommend that all Diploma entrants also sit either unit (P01) Insurance practice and regulation or unit (IF1) Insurance, legal and regulatory as these cover the workings of the market, including the legal and regulatory framework and the essentials of insurance practice.

Advanced Diploma

To achieve the Advanced Diploma you must accumulate a minimum of 290 credits, with at least 180 of these obtained at Advanced Diploma level.

The following compulsory unit requirement applies:

Unit	Credits	or	Unit	Credits
(IF1) Insurance, legal and regulatory	15		(P01) Insurance practice and regulation (Diploma in Insurance unit – final examination sitting April 2010)	20

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

The following compulsory unit requirements apply:

Units	Credits	or	Units	Credits
(P04) Business practice (final examination sitting April 2010)	20		(530) Business and economics (Advanced Diploma in Insurance unit); or	30
			(P92) Insurance business and finance (Diploma in Insurance unit – first examination session October 2009)	25
(P05) Insurance law	25	–	–	–

Note: In order to complete the Diploma you must pass **one** unit, of your choice, from the Advanced Diploma.

The following compulsory unit requirements apply:

Units	Credits	or	Units	Credits
(510) Risk, regulation and capital adequacy	30	–	–	–
(P05) Insurance law (Diploma in Insurance unit)	25	–	–	–
(530) Business and economics	30		(P04) Business practice (Diploma in Insurance unit – final examination sitting April 2010); or	20
			(P92) Insurance business and finance (Diploma in Insurance unit – first examination session October 2009)	25

What does each qualification involve?

There is no prescribed order in which units must be taken, but it is strongly recommended that, for each qualification, you sit the required compulsory units first since these provide foundation knowledge upon which the others build.

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.

Detailed opposite is a list of the available Certificate, Diploma and Advanced Diploma units. Full details are available online at www.cii.co.uk or from Customer Service.

Note: The Diploma in Financial Planning unit (J07) Supervision in a regulated environment can be used towards completion of the Certificate, Diploma and Advanced Diploma. This covers key aspects of supervision, leadership and coaching, and provides 20 Diploma level credits on completion.

See the Diploma/Advanced Diploma in Financial Planning brochure ref ICF014 (11/08) for details.

Certificate in Insurance units		Credits	Other qualifications/tests providing Certificate level credits:	Lloyd's and London Market Introductory Test (LLMIT)	
(IF1)	Insurance, legal and regulatory – Certificate compulsory unit	15 per unit			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
(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				
Award in Insurance unit		Credits			
(FIT)	Foundation Insurance Test	6			
Diploma in Insurance units					Credits
(P01)	Insurance practice and regulation (final examination sitting April 2010)	20 per unit			
(P04)	Business practice – Diploma compulsory unit (final examination sitting April 2010)				
(P18)	Property claims handling (final examination sitting October 2009)				
(P21)	Commercial insurance contract wording				
(P80)	Underwriting practice				
(P81)	Insurance broking practice				
(P85)	NEW Claims practice (first examination sitting October 2009)				
(P86)	NEW Personal insurances (first examination sitting October 2009)				
(P05)	Insurance law – Diploma/Advanced Diploma compulsory unit	25 per unit			
(P10)	Commercial insurance practice				
(P11)	Personal insurance practice (final examination sitting October 2009)				
(P92)	NEW Insurance business and finance (first examination sitting October 2009)				
(P93)	NEW Commercial property and business interruption (first examination sitting October 2009)				
(P94)	NEW Motor insurance (first examination sitting October 2009)				
(P96)	NEW Liability insurances (first examination sitting October 2009)				
Advanced Diploma in Insurance units					Credits
(510)	Risk, regulation and capital adequacy – Advanced Diploma compulsory unit	30 per unit			
(530)	Business and economics – Advanced Diploma compulsory unit				
(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 (final examination sitting October 2009)				
(755)	Liability insurance (final examination sitting October 2009)				
(760)	Personal lines insurance (final examination sitting October 2009)				
(765)	Motor insurance (final examination sitting October 2009)				
(770)	Principles of marine insurance				
(785)	Principles of reinsurance				
(790)	Private medical insurance				
(815)	Underwriting management				
(820)	Claims management (non-life)				
(930)	Insurance broking				
(945)	Marketing				
(CITIP)	Certificate in IT for insurance professionals (see page 9 for details)				

What does each qualification involve?

The mechanics of studying

The 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.

These set out the learning outcomes expected of candidates in the exam for each unit.

The syllabuses also identify published material designed to assist you in preparing for exams under the following headings: primary text, additional reading, 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. A full syllabus is provided within each study text.

Units	Exam format	Length of exam	Nominal passmark	Study hours	Exam sessions
IF1/IF2/IF7	100 multiple choice questions	2 hours	70%	50	Year round (UK only, international sessions held during Apr & Oct – see p16) – see www.cii.co.uk/online for details
IF3/IF4/IF8	75 multiple choice questions				
IF5/IF6	50 multiple choice questions and 25 mini case study multiple choice questions				
P01/P04/P18/P92	20 compulsory short answer questions	3 hours	55%	96	April / October
P05/P10/P11/P93/P94/P96	14 compulsory short answer questions and two case study/essay questions from a choice of three or four	3 hours		100	
P21	Eight compulsory short answer questions and two case study/essay questions from a choice of three or four	2 hours		96	
P80/P81/P85/P86	15 short answer questions	2 hours		100	
510 – 945	Eight compulsory short answer questions, plus case study and essay questions. Most include one compulsory case study question, although the overall level of choice depends upon the unit being examined	3 hours		120	

Notes: The recommended minimum study hours are shown in the table above (this will vary according to your experience and ability).

The nominal pass marks are also shown. However, the actual pass marks may vary slightly from one session to another to ensure that the pass standard remains constant.

You may sit as many exams as desired at a single sitting, although it is strongly recommended that no more than two Diploma or Advanced Diploma units per session are taken.

Diploma/Advanced Diploma: Additional benefits

By sitting certain combinations of units, you can acquire other qualifications on the way to completing the Diploma/Advanced Diploma:

Certificate in Contract Wording

Contract certainty is one of the major issues facing the insurance industry, especially within Lloyd's and the London Market.

The FSA requires the provision of clear, comprehensive and fully-agreed policy wordings before inception to all policyholders.

To help individuals and organisations meet this requirement, the CII has developed the Certificate in Contract Wording. It is designed to enhance knowledge of the practical application of wordings and the issues associated with them.

To acquire the Certificate, you must study and pass two units from the Diploma in Insurance: (P05) Insurance law (or already hold one of the withdrawn legal units P03 or 520) and (P21) Commercial insurance contract wording. Candidates meeting the completion requirements will automatically be awarded the Certificate in Contract Wording.

Certificate in IT for Insurance Professionals (CITIP)

The CII and the British Computer Society (BCS) have jointly developed the **Certificate in IT for Insurance Professionals**, which provides anyone working in insurance with a firm grounding in IT applications. In addition to being an Advanced Diploma unit, worth 30 credits, it is also a qualification in its own right, with a certificate awarded by the BCS upon completion.

A separate 'Certificate in IT for Insurance Professionals' booklet containing an outline of the qualification, exam regulations, detailed syllabus, entry form and coursebook order form is available online at www.cii.co.uk or from Customer Service.

Diplomas in Life and Disability Underwriting and Claims

The CII and the Assurance Medical Society (AMS) jointly developed the **Diploma in Life and Disability Underwriting (DLDU)**. This is awarded, subject to terms and conditions, to candidates who pass: (P05) Insurance law; (555) Life and disability underwriting; and (735) Life assurance.

The CII, AMS and the Health Claims Forum jointly developed the **Diploma in Life and Disability Claims (DLDC)**. This is awarded, subject to terms and conditions, to candidates passing: (P05) Insurance law; (556) Life and disability claims; and (735) Life assurance.

For information about the DLDU and/or DLDC, contact the AMS on +44 (0)20 7636 6308 or write to them at Lettsom House, 11 Chandos Street, London W1G 9EB.

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, Diploma or the Advanced Diploma in Insurance you are able to select units from the entire insurance qualifications framework.

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, 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 able to claim up to 30 credits in respect of financial planning units, in the case of the Diploma you are allowed to claim up to 60 credits and for the Advanced Diploma, 180 credits.

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

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/learningstatement 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.

Note: that, to be awarded a CII qualification, you must obtain, by CII examination, a pass in a unit from the qualification that you are looking to complete, or from a higher qualification in the CII's general insurance qualifications framework. This rule applies irrespective of how many credits your existing qualifications might provide.

Full details of the rules relating to accreditation can be found at www.cii.co.uk/accreditation

Please note accreditation is awarded at the discretion of the CII Qualifications, Examinations and Assessment committee.

Study options and revision aids

To help you pass your 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, revision aids and exam entry.

The study options and revision aids available vary according to the unit selected. Details are shown opposite and overleaf.

In addition, regardless of which study option you choose, there is a standard exam entry fee of:

	Member	Non-member
Certificate	£87	£119
Diploma	£106	£141
Advanced Diploma	£111	£148

Guidance on Certificate unit purchases

- You must purchase the study text and revision aids for the period during which you plan to sit the exam.
- CII exam periods run from 01 January through to 31 December.
- New editions of study texts and learning materials can be purchased each year, from October, for examination from January.
- Electronic updates will automatically be made available for study texts during the examination period to which they relate. Full details are included on the title page of the study text.

Guidance on Diploma/Advanced Diploma unit purchases

For Diploma and Advanced Diploma units the listed study options are based on an enrolment period of 12 months, during which time you are recommended to sit the exam, whilst these are current.

Important notes applicable to all qualifications:

- Please allow ten days for delivery to a UK address and twenty one days to a non-UK address from receipt of your order.
- For materials sent within the UK, you, or someone acting on your behalf, will be required to sign for the delivery.

Study options	Cost per unit		
	Member	Non-member	
Continuous assessment (all units except IF1-IF8, P18, P21, P80, P81, P85, P86, P92-P94, P96 and CITIP)	£206	£230	This includes the provision of a study text designed to support study towards a thorough understanding of the exam syllabus, together with the facility to complete assignments and a compulsory exam standard assignment, all of which are marked by an expert tutor. The study text breaks down the syllabus into concise sections, with each chapter containing clearly defined learning objectives and a series of self-test questions. It also includes a detailed exam syllabus outlining the subject areas that may be tested in the exam and updates for 12 months after enrolment. The tutor will give feedback and model answers to the non-compulsory assignments, helping you gauge your progress. You will also be able to make use of a written enquiry service where advice can be sought on specific issues. Candidates meeting the qualifying requirements in this course will have a fixed increase of 10% of the total marks available on the exam paper applied to their exam result. Past results have indicated significantly higher success rates for candidates who have selected this form of study. Full details can be found at www.cii.co.uk
Study text with correspondence course (units IF1-IF7 only)	£160	£189	This is a distance learning course. The package includes the provision of a study text and electronic updates together with a suite of online services delivered through our 'RevisionMate' study tool. RevisionMate includes a study planner, a knowledge check (multiple choice test) facility covering each chapter, definitions of key terms, specimen exam and hints and tips (full details will be provided with your study text). These have been developed to assist you in understanding and learning the topics covered by the exam syllabus. 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. Results show that candidates who study by correspondence course achieve a better record of exam success than those using a study text only.
Diploma and Advanced Diploma units Study text with updates (New units P86, P93 and P96 available Jan 09 and units P85, P92 and P94 in June 09.)	£119	£135	This is a self-study course. There is no support from a tutor with this option. This option consists of the study text with paper updates for 12 months after enrolment.
Certificate units Study text with updates (IF1-IF8)	£104	£122	This is a self-study course. There is no support from a tutor with this option. This option consists of the study text, with electronic updates which will automatically be made available for the examination period to which they relate. (Full details are included on the title page of the study text). Additionally you will gain access to an unrivalled suite of online services to support your studies through our 'RevisionMate' study tool. See the 'Study text with correspondence course' section above for details.

Upgrading your study option		
Upgrade from	Study text with updates	
	Member	Non-member
to correspondence course (units IF1-IF7 only)	£56	£67
to continuous assessment (all units except IF1-IF8, P18, P21, P80, P81, P85, P86, P92-P94, P96 and CITIP)	£87	£95

Note: You can only upgrade to continuous assessment if you have not previously submitted assignments in that unit under a current or previous correspondence or continuous assessment course.

Full time Diploma and Advanced Diploma programmes

Diploma/Advanced Diploma – a 12 month programme split into two semesters with enrolment dates in October and May which provides a rapid route to the following Diploma and Advanced Diploma units: October-April: P05, 510, 530, 930; May-October: P01, 760, 820, 945.

This programme provides:

- Intensive face-to-face tuition programme
- Expert tutors delivering tutorials, tests and mock exams
- Complete qualification package to include: study texts, continuous assessment, key facts booklets (where available), multi-media package, membership and exam entries
- Dedicated training venue in the City of London.

For more information on the full time Diploma/Advanced Diploma in Insurance programme contact Face-to-Face Training on +44 (0)20 7283 3117, or on face-to-facetraining@cii.co.uk

Study options and revision aids

The CII offers a range of revision aids to support all learning styles and routines. Each has been developed to provide practical assistance in understanding the unit syllabus and achieving exam success.

Revision aids		Cost per unit		
		Member	Non-member	
Examination guides (all units)		£10.75 (inc VAT)	£11.75 (inc VAT)	Depending upon the selected unit, these comprise either a past paper with examiners' comments on candidates' performance and key points for inclusion in your answers or a complete specimen examination and answers, highlighting syllabus areas covered and useful hints. 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: with regard to Certificate units, the content of the latest exam guide is included FREE within the RevisionMate study tool provided with all study text purchases.
Key facts booklets (IF1-IF6, IF8, P01, P04, P05, P10, 510, 530, 760, 765, 785)		£22	£24	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 a coursebook is impractical.
ed.LEARN® (IF1, IF2, IF5, IF6, IF8, P01, P04, P05, P10, P11)		£75.90 (inc VAT)	£75.90 (inc VAT)	Online tutorial providing highly interactive study, backed by a revision assessment tool to check understanding as you progress with your studies. Visit www.ed.cii.co.uk to view the course demo. Notes: * This material can also be purchased in a CD ROM format for £78. * Minimum operating requirements: – ed.LEARN® - Windows 2000, XP or Vista; Internet Explorer 6 or 7. – CD-ROM - Windows 2000, XP or Vista; Internet Explorer 6 or 7, 8 speed CD-ROM. 80MB free hard disk space.
Winning the brain game (CD-ROM)		£28	£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. Operates on all Windows software.
Revision workshops (see table on pg 14)	(P05)	£375	£430	Available prior to examinations, these courses enable you to: • discover what the examiner is looking for; • discuss the common mistakes made by candidates and how to avoid them; • learn useful revision and exam techniques; • clarify your areas of concern in the syllabus. The workshops provide you with the opportunity to examine in more detail the exam syllabus and past papers. They provide additional question practice and support in-depth discussion with the course tutor. The evening classes are ideal for those candidates who find that work commitments prevent them attending courses during working hours.
	(530, 785, 930)	£400	£460	
Revision days (see table on pg 14)	(IF1-IF5, IF8)	£200	£230	
	(P01, P04, P05, P10, P11, P18, P21, P80, P81)	£225	£260	
	(510, 530, 655, 735, 755, 760, 765, 815, 820, 945)	£250	£290	
Evening classes (see table on pg 14)	Eight week course (510)	£480	£555	
	Six week course (P05, 530, 785)	£360	£415	
Generic using formulae and practising calculations course (see table on pg 14)		£250	£290	This one-day course is suitable for candidates studying for the statistical component of 510 and will enable you to: • obtain a basic grounding in mathematical principles; • discuss the common mistakes made by candidates and how to avoid them; • clarify your areas of concern in using formulae.
Exam techniques course (see table on pg 14)		£150	£175	This generic half-day course helps candidates studying for the Diploma/Advanced Diploma refine their overall exam approach by: • reviewing technique on both short and essay questions; • identifying what the examiner is looking for; • discussing the common mistakes made by candidates and how to avoid them.

Revision courses 2009

“
In 2008
candidates who
attended a CII
revision course
improved their
chances of
exam success
by up to 60%*”

* Source: CII Statistics 2008

Remember to visit www.cii.co.uk for details of additional courses that we will be running during 2009.

Revision workshops	Dates	Venue
(P05) Insurance law	24-25 Mar/24-25 Sept	London
(655) Risk management	11-12 Mar	London
(530) Business and economics	25-26 Mar/22-23 Sept	London
(785) Principles of reinsurance	31 Mar-01 Apr/28-29 Sept	London
(930) Insurance broking	16-17 Mar/01-02 Oct	London
Revision days	Dates	Venue
(IF1) Insurance, legal and regulatory	12 Jan/09 Feb/09 Apr/13 May/15 Jun/13 Jul/10 Aug/12 Oct/09 Nov/07 Dec 03 Mar/04 Sept	London Manchester
(IF2) General insurance business	14 Jan/10 Feb/14 Apr/14 May/16 Jun/16 Jul/11 Aug/02 Oct/10 Nov/11 Dec 06 Mar/02 Sept	London Manchester
(IF3) Insurance underwriting process	15 Jan/11 Feb/15 Apr/18 May/17 Jun/15 Jul/12 Aug/13 Oct/11 Nov/08 Dec 05 Mar/03 Sep	London Manchester
(IF4) Insurance claims handling process	20 Feb/22 May/17 Jul/19 Oct	London
(IF5) Motor insurance products	19 Feb/27 May/16 Jul/19 Oct	London
(IF8) Packaged commercial insurances	16 Jan/16 Apr/27 May/18 Jun/21 Jul/13 Aug/15 Oct/12 Nov/10 Dec	London
(P01) Insurance practice and regulation	11 Mar/30 Mar/07 Apr/11 Sept/23 Sept/05 Oct	London
(P04) Business practice	17 Mar/30 Mar/06 Apr/16 Sept/01 Oct/05 Oct	London
(P05) Insurance law	18 Mar/27 Mar/03 Apr/07 Apr/14 Sept/22 Sept/29 Sept/06 Oct	London
(P10) Commercial insurance practice	24 Mar/28 Sept	London
(P11) Personal insurance practice	01 Apr/30 Sept	London
(P18) Property claims handling	12 Mar/21 Sept	London
(P21) Commercial insurance contract wording	26 Mar/21 Sept	London
(P80) Underwriting practice	04 Sept	London
(P81) Insurance broking practice	11 Sept	London
(510) Risk, regulation and capital adequacy – Statistics – non-statistics	10 Mar/17 Mar/24 Mar/02 Apr/08 Sept/17 Sept/24 Sept/01 Oct 11 Mar/18 Mar/25 Mar/03 Apr/09 Sept/18 Sept/25 Sept/02 Oct	London London
(530) Business and economics	13 Mar/02 Apr/18 Sept/30 Sept	London
(655) Risk management	19 Mar/06 Apr/17 Sept/30 Sept	London
(735) Life assurance	27 Mar/25 Sept	London
(755) Liability insurance	02 Apr/29 Sept	London
(760) Personal lines insurance	26 Mar/22 Sept	London
(765) Motor insurance	24 Mar/28 Sept	London
(815) Underwriting management	20 Mar/14 Sept	London
(820) Claims management (non-life)	30 Mar/24 Sept	London
(945) Marketing	11 Mar/01 Apr/17 Sept/02 Oct	London
Evening classes	Dates	Venue
Eight week course: (510) Risk, regulation and capital adequacy (Tuesdays 17.30-19.30)	17 Feb/24 Feb/03 Mar/10 Mar/17 Mar/24 Mar/31 Mar/07 Apr 18 Aug/25 Aug/01 Sept/08 Sept/15 Sept/22 Sept/29 Sept/06 Oct	London London
Six week courses: (530) Business and economics (Wednesdays 17.30-19.30)	04 Mar/11 Mar/18 Mar/25 Mar/01 Apr/08 Apr 02 Sep/09 Sep/16 Sep/23 Sep/30 Sep/07 Oct	London
(785) Principles of reinsurance (Wednesdays 17.30-19.30)	04 Mar/11 Mar/18 Mar/25 Mar/01 Apr/08 Apr 02 Sept/09 Sept/16 Sept/23 Sept/30 Sept/07 Oct	London
(P05) Insurance law (Mondays 17.30-19.30)	02 Mar/09 Mar/16 Mar/23 Mar/30 Mar/06 Apr 01 Sept (Tue)/07 Sept/14 Sept/21 Sept/28 Sept/05 Oct	London London
Generic using formulae and practising calculations	Dates	Venue
One-day course	16 Mar/15 Sept	London
Exam techniques	Dates	Venue
Generic half-day	09 Mar/15 Sept	London

Important deadlines

The following dates apply to all Diploma and Advanced Diploma exam entries together with all non-UK Certificate entries.

Candidates planning to sit Certificate exams in the UK should go to www.cii.co.uk/online

	April 2009 Exams	October 2009 Exams
Last date for continuous assessment enrolment		
• UK	09 Jan 09	06 Jul 09
• International	19 Dec 08	15 Jun 09
Last date for continuous assessment assignments to be with your tutors	02 Mar 09	01 Sept 09
Closing date for your exam entry and payment to reach the CII		
At normal fee		
• UK and International (Changes to exam entries, etc. not accepted after these dates)	11 Mar 09	09 Sept 09
At late entry fee		
• UK and International	03 Apr 09	02 Oct 09
Exam entry confirmation*	Despatched within seven working days from receipt of application form	
Receive your exam admission permit*	Despatched ten days before the exams begin or six weeks for international applicants	
Sit exams	20-23 Apr 09	19-22 Oct 09
Exam results released online	Results are sent by 1st class post on the date shown. Please allow five days for delivery to a UK address and fourteen days for a non-UK address	
www.cii.co.uk and posted		
• UK exam centres	19 Jun 09	18 Dec 09
• International exam centres	26 Jun 09	23 Dec 09
Entry for the next exam	You do not have to wait for your results before entering for an exam in the next session	

* Please contact 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 date or times of the exam for which you have entered and that the exam shown on your permit is the one that you intend to sit. If there is any discrepancy you should contact Customer Service immediately.

“ Willis has long associations with the CII, and our commitment to industry standard professional qualifications remains as strong as ever. We actively encourage all technical staff to study towards professional excellence, and fully support those who do.

Grahame Millwater
President
Willis

Willis

For example, we require all our graduates to obtain the Advanced Diploma qualification. As a Global Organisation it is crucial to have consistent and high standards across our entire Group, and increasingly the CII help us do this – their qualifications help provide a technical foundation essential for a career in insurance.”

Exam timetable

The following dates apply to all Diploma and Advanced Diploma exams together with all non-UK Certificate exams.

Candidates planning to sit Certificate exams in the UK should go to www.cii.co.uk/online

Exam Unit	Date	Time
Non-UK Certificate exams		
(IF1) Insurance, legal and regulatory	20 Apr/19 Oct	10.00
(IF2) General insurance business	21 Apr/20 Oct	10.00
(IF3) Insurance underwriting process	22 Apr/21 Oct	10.00
(IF4) Insurance claims handling process	23 Apr/22 Oct	10.00
(IF5) Motor insurance products	20 Apr/19 Oct	10.00
(IF6) Household insurance products	21 Apr/20 Oct	10.00
(IF7) Healthcare insurance products	22 Apr/21 Oct	10.00
(IF8) Packaged commercial insurances	23 Apr/22 Oct	10.00
Diploma exams		
(P01) Insurance practice and regulation	22 Apr/22 Oct	13.30
(P04) Business practice	21 Apr/20 Oct	13.30
(P05) Insurance law	20 Apr/19 Oct	13.30
(P10) Commercial insurance practice	22 Apr/22 Oct	13.30
(P11) Personal insurance practice	23 Apr/22 Oct	13.30
(P18) Property claims handling	23 Apr/22 Oct	13.30
(P21) Commercial insurance contract wording	22 Apr/21 Oct	10.00
(P80) Underwriting practice	21 Apr/20 Oct	10.00
(P81) Insurance broking practice	23 Apr/22 Oct	10.00
(P85) Claims practice	19 Oct	10.00
(P86) Personal insurances	21 Oct	10.00
(P92) Insurance business and finance	19 Oct	13.30
(P93) Commercial property and business interruption	22 Oct	13.30
(P94) Motor insurance	19 Oct	13.30
(P96) Liability insurances	22 Oct	13.30
Advanced Diploma exams		
(510) Risk, regulation and capital adequacy	23 Apr/22 Oct	13.30
(530) Business and economics	21 Apr/20 Oct	13.30
(555) Life and disability underwriting	21 Apr/20 Oct	13.30
(556) Life and disability claims	22 Apr/20 Oct	13.30
(655) Risk management	20 Apr/19 Oct	13.30
(735) Life assurance	23 Apr/22 Oct	13.30
(745) Principles of property insurances	21 Apr/20 Oct	13.30
(750) Commercial property insurance underwriting	23 Apr/22 Oct	13.30
(755) Liability insurance	21 Apr/20 Oct	13.30
(760) Personal lines insurance	20 Apr/19 Oct	13.30
(765) Motor insurance	23 Apr/22 Oct	13.30
(770) Principles of marine insurance	20 Apr/19 Oct	13.30
(785) Principles of reinsurance	21 Apr/20 Oct	13.30
(790) Private medical insurance	20 Apr/19 Oct	13.30
(815) Underwriting management	20 Apr/19 Oct	13.30
(820) Claims management (non-life)	22 Apr/19 Oct	13.30
(930) Insurance broking	22 Apr/21 Oct	13.30
(945) Marketing	23 Apr/22 Oct	13.30

Costs, fees and refunds

Membership fees are applicable to the period 01 Sept 2008-31 Aug 2009.
All other fees apply 01 Jan 2009-31 Dec 2009.

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.

If you pay the subscription fee by monthly Direct Debit, we will spread the cost of the admission fee across your 12 monthly payments.

* A discounted membership fee is available for individuals residing in the following countries which have been categorised as 'low income' or 'lower middle income' countries by The World Bank Country Income Classification List (as of July 2007) with the exception of those marked with †.

Afghanistan, Angola, Azerbaijan, Bangladesh, Benin, Burkina Faso, Burundi, Cambodia, Central African Republic, Chad, Comoros, Congo (Dem. Republic of), Cote d'Ivoire, Egypt, Eritrea, Ethiopia, Gambia, Georgia, Ghana, Guinea, Guinea-Bissau, Guyana, Haiti, India, Indonesia, Kenya, Korea (Dem. Peo. Rep. of), Kyrgyzstan, Lao People's Democratic Rep., Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mongolia, Mozambique, Myanmar, Nepal, Niger, Nigeria, Pakistan, Papua New Guinea, Republic of Moldova, Rwanda, Sao Tome and Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, †South Africa, Sri Lanka, Sudan, Tajikistan, Tanzania (United Rep. of), Timor Leste, Togo, Uganda, Ukraine, Uzbekistan, Vietnam, Yemen, Zambia, Zimbabwe.
Low GDP per capita membership fee £35.

London only – £6.09 per month or £73.00 per annum

UK & Channel Isles – £5.84 per month or £70 per annum

International* £50

Study options and revision aids

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

Refer to page 10 for a full listing

Exam entry fees – applicable in respect of exams sat in 2009

In respect of Diploma and Advanced Diploma units the fees shown are for entries received before normal closing dates.

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 £72 per unit. This is subject to space being available at the exam centre.

	Member	Non-member
Fee per Certificate unit	£87	£119
Fee per Diploma unit	£106	£141
Fee per Advanced Diploma unit	£111	£148

Accreditation of prior learning

A fee is payable for each individual credit awarded in respect of prior learning that you have undertaken outside of CII qualifications.

This is payable once the credits have been awarded. See page 9 for details on the accreditation of prior learning.

	Member	Non-member
Fee per credit	£3	£4

Change of session, unit or centre fee

Certificate units (UK)

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.

Certificate units (non-UK)/Diploma/Advanced Diploma units

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.

Note: In respect of all units no changes, apart from your address or name (which must be supported by original or certified evidence), can be made to your exam entry after the specified deadlines set out above. After the relevant deadline has passed should you wish to withdraw you will not receive a refund except in the case of illness.

Change after entry £38

Refunds

Certificate units (UK)

Cancellation of an exam entry at least 21 days before the date of the exam for which you have entered:

50% of exam entry fee

Certificate (non-UK)/Diploma/Advanced Diploma units

Cancellation of an exam entry before the final closing date at normal fee:

All units

Absence from exam with medical evidence (to be received within two months of the date of the exam):

50% of exam entry fee or free entry

Post-results review of marking (Diploma/Advanced Diploma units only)

Available only to those candidates achieving an X-grade.

Further details can be found at www.cii.co.uk/notestoresults
Refunds will be made in the case of successful appeals.

£72 per paper

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/Diploma/Advanced Diploma in Insurance Application Form

ICI005 (11/08)

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/PFS permanent identity number (PIN) if known

PIN

Mr/Mrs/Miss/Ms Surname

Forenames Date of Birth

Employer's name

Tel Ext Mobile

e-mail*

Work address

Postcode Country

Home address

Postcode Country

*** Please take care when providing your email address as most correspondence will be sent electronically. Email address must be included when ordering ed.LEARN.**

Tick address to be used for postal correspondence Home Work

Please only tick one box per category

Type of organisation

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

Area of work

<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		

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			

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 by ticking the appropriate box:

Certificate in Insurance Diploma in Insurance Advanced Diploma in Insurance

Certificate/Diploma/Advanced Diploma in Insurance Application Form – IC005 (11/08)

Enter your name

Section D – Exam Entry

I wish to enter the following exams in April/October 2009 (delete session which is not applicable) at the centre in:

First choice Centre code

Second choice Centre code

Unit codes	Member	Non-member	No of units	Entry fee
Certificate: Only complete this section if you are planning to sit Certificate exams outside of the UK . To sit an exam in the UK, you must enter online at www.cii.co.uk/online or by calling Customer Service				
<input type="text"/>	£87	£119	<input type="text"/>	£
Diploma				
<input type="text"/>	£106	£141	<input type="text"/>	£
Advanced Diploma				
<input type="text"/>	£111	£148	<input type="text"/>	£

Sub total £

Additional late entry fee (See pg 20) £

Section E – 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, Code of Ethics and Conduct, all Rules and Regulations as may be issued by the institute from time to time and the Bye-laws of any local institute of which I may become a member. I also agree to commit myself to an annual programme of Continuing Professional Development (qualified members only).

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.

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 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

Please allow 10 days for delivery in the UK and 21 days internationally 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

Certificate/Diploma/Advanced Diploma in Insurance Application Form – IC005 (11/08)

Enter your name

Section F – Total payable and method of payment

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

Note: All prices quoted are inclusive of VAT, where appropriate, at the current rates. Prices are subject to change without notice. Please ensure that where applicable you have included the appropriate postage fee – see Section C.

Total payable £

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

Cash/cheque payable to The Chartered Insurance Institute (please write CII PIN number if known on the back of the cheque).

Note: All remittances must be in Sterling. Cash should only be sent by registered post. 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).

Credit/debit card: Please debit my/our account with the total cost of the goods and services ordered on this form.

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 above

Cardholder's Signature

Date

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

If you have a UK bank account you can spread the cost of membership by paying via monthly Direct Debit at no extra charge.

By paying via monthly Direct Debit, you will automatically be entered into a prize draw to win a year's free subscription to the CII. Please call CII Customer Service on +44 (0)20 8989 8464 to set up a monthly Direct Debit over the phone or complete the Direct Debit mandate below, sign the declaration in Section E and return to CII Customer Service.

Instructions to your Bank or Building Society to pay by Direct Debit (Please complete all fields)



1. Name and full postal address of your Bank or Building Society branch

To: The Manager <small>(Bank/Building Society)</small>
Address
Postcode

Please complete this Direct Debit instruction if you have a **UK Bank account**.
Post only to: CII, Customer Service, 42-48 High Road, South Woodford, London E18 2JP

Originator's identification no.

2. Name(s) of account holder(s)

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (CII PIN)

I wish to pay my subscription by monthly Direct Debit payments

Signature

Date

Banks and Building Societies may decline to accept instructions to pay Direct Debits from some types of accounts.

The Direct Debit Guarantee: The Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society. If the amounts to be paid or the payment dates change The CII will notify you 10 working days in advance of your account being debited or as otherwise agreed. If an error is made by The CII or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid. You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to The CII.

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

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.'

Certificate/Diploma/Advanced Diploma in Insurance Individual Prior Learning Accreditation Form

IC005 (11/08)

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 Mobile

e-mail*

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 postal correspondence Home Work

Please only tick one box per category

Type of organisation

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

Area of work

<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		

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			

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

If yes, please specify

Certificate/Diploma/Advanced Diploma in Insurance Application Form – IC005 (11/08)

Enter your name

Section B – Qualifications Held

Please note the qualification/examination which you are making an application in respect of **must** have an 80% syllabus match to a current CII qualification/examination. The qualification/examination must have been assessed in a formal examination environment with the same format of examination questions as the CII unit(s) in respect of which you are seeking to claim credits. For example, Diploma or Advanced Diploma level credits cannot be guaranteed for qualifications/examinations which are assessed by multiple choice examinations.

Please refer to the CII website www.cii.co.uk/accreditation for further details of the accreditation rules and requirements.

Please complete this section with the details of the qualification/examination you are seeking prior learning credits for.

Qualifications/examinations held	Awarding body	Date of award	CII unit(s) in respect of which you are seeking to claim credits	Certified copy of your qualification/examination certificate	Certified copy of transcript of individual modules completed as part of an overall qualification, e.g. university degree
				Copy Enclosed <input type="checkbox"/> <i>tick</i>	Copy Enclosed <input type="checkbox"/> <i>tick</i>
				Copy Enclosed <input type="checkbox"/> <i>tick</i>	Copy Enclosed <input type="checkbox"/> <i>tick</i>
				Copy Enclosed <input type="checkbox"/> <i>tick</i>	Copy Enclosed <input type="checkbox"/> <i>tick</i>
				Copy Enclosed <input type="checkbox"/> <i>tick</i>	Copy Enclosed <input type="checkbox"/> <i>tick</i>

Important notes:

- Applications cannot be considered without evidence of qualifications. All photocopies must be certified as true copies of the originals by a member of the CII or the Personal Finance Society, or a local, associated or affiliated institute official, whose CII PIN should also be given (where applicable).
- They should confirm by: signing the photocopy; printing their name; including their permanent identity number (PIN) where applicable; **indicating the capacity in which they are signing; and confirming they have inspected the original and the photocopy is a true representation of the same.**

Section C – Fees

A fee of £3 members/£4 non-members is payable for each individual credit awarded in respect of prior learning that you have undertaken outside of CII qualifications.

Please do not send any payment at this time. If you are granted credits you will be advised of the fee payable.

Section D – Declarations

I apply for accreditation in the unit(s) indicated above.

Terms and conditions

I have read and agree to the terms and conditions (contained in this brochure) in applying for accreditation of prior learning as indicated above.

Data Protection and Privacy

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

“ Our aim is to incorporate technical excellence into everything we do, and to combine it with first-class customer service at each and every opportunity. To make this a reality we strongly encourage and support our insurance and non-insurance staff to pursue CII insurance qualifications. This helps individuals develop their full career potential, and provides the core insurance skills and knowledge that is critical to business success in our demanding and competitive industry.”

Tony Weatherhead ACII, Chartered Insurer
Training Services Manager
NFU Mutual



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