

Application Form

FOR EXISTING MEMBERS ONLY – THIS FORM IS VALID UNTIL 31 AUGUST 2009

Reference:
(For office use only)

Section A – Personal details

(Please complete all fields - it is essential we have your email address as this is our main channel of contact with you)

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

PIN

Mr/Mrs/Miss/Ms Surname

Forenames Date of Birth

Daytime tel Mobile

e-mail

For every email address we receive, we will donate 10p towards Trees for Life reforestation programme in the Scottish Highlands. (see note 3)

Address

Postcode Country

Employer Name

Is this your home or work address Home Work

Please tick one box per category

Type of organisation

- a) General Insurance** Insurance company Broker/Intermediary Reinsurance company/broker Loss adjuster/ Loss assessor
 Bank/Building society Consultancy Legal Lloyds
 Other
- b) Financial Services** Independent financial adviser Independent financial adviser – Network Multi-tied Tied agent (sole agent)
 Company (insurer/assurer) back office Bank/Building Society back office Investment house Whole of Market
 Other
- c) Mortgage** Mortgage intermediary/adviser Network Packager Estate Agent
 Bank Building Society Specialist lender Other

Area of work

- Advising clients Underwriting Finance Product selling to advisers
 HR/Training Compliance Broking Claims/Loss adjusting
 Technical adviser Mortgages Risk Management/Surveying Other
 Sales/Marketing Claims Administration/Processing

Job category

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

Section G – Declaration

Declaration: I confirm that I am eligible to apply for the designatory letters I have specified and hereby apply to become a qualified member of The Chartered Insurance Institute (CII) and The Personal Finance Society. I agree, if admitted, to abide by the Charter and 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. I also agree to commit myself to an annual programme of Continuing Professional Development. If at any time I cease to be a member of The CII/Personal Finance Society, I undertake to return any certificate of membership.

In applying for admission to membership of the Personal Finance Society (if applicable) I acknowledge that in doing so I assume a commitment to pay £1 in the event of the Society subsequently being wound-up and there being a shortfall in assets.

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, course books 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

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 on this form, which right shall (subject to the Regulations) expire in 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 the 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.

Signature

Date

Section H – Subscription details

Your current cycle of membership renewal will continue. **You have nothing to pay at this stage.** You will be charged the appropriate subscription fee at your new level at your next renewal. Please see note 4 for more information.

Spread your payments by paying via monthly Direct Debit

It is recommended that all members who have a UK current account should pay their membership by monthly Direct Debit. Please complete the attached Direct Debit mandate and send it with this form to: CII, Customer Service, 42-48 High Road, South Woodford, London E18 2JP.

The mandate will start at your next renewal. We will advise you of your monthly payment before we collect any money.

Notes

1. Local Institutes (UK Only)

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

If you come within the Insurance Institute of London area your subscription is in all instances £3 higher. (The area covered by the Insurance Institute of London is defined as all London postal districts except the following: N9, N11, N14, N21, NW9, E4, E6, E7, E10, E11, E12, E13, E15, E16, E17, E18, W3, W4, W5, W6, W7, W12, W13, SW20, SE25, SE30.)

2. Faculties

As a CII member you are able to join a faculty for free. Please give your faculty preference in Section D.

Insurance Broking Faculty	–	If you work for an insurance broker
Claims Faculty	–	If you work in Claims
London Market Faculty	–	If you work for Lloyds's Brokers, Lloyd's and London Company Underwriters and others practitioners.
Underwriting Faculty	–	If you work for a general insurance company
Life & Pensions Faculty	–	If you work for a life and pensions company

The PFS offers three faculties which will provide enhanced membership benefits designed to support your professional development.

They provide specialist knowledge through events, email bulletins and networking opportunities.

If you join the PFS at Diploma level or above, you will automatically be enrolled in the three PFS faculties: Retirement and Care, Corporate Financial Planning and Personal Financial Planning. There is no additional subscription fee to belong to these faculties. For more information please visit www.thepfs.org/faculties.

3. Help us make a difference by providing us with your e-mail address:

Given the increased focus on environmental issues and climate change, we are trying to reduce the number of paper mailings we send to our members. Please help us to do this by providing us with your email address, if you have one. For every email address we receive, we will donate 10p towards Trees for Life's reforestation programme in the Scottish Highlands.

To provide or update your e-mail address,

please log onto www.cii.co.uk/amend

or telephone CII +44 (0) 208 989 8464 or PFS +44 (0) 208 530 0852



4. Fees

CII member

Level	UK subscription (Monthly fee)	UK subscription (Annual fee)	International subscription (Annual fee)	Low GDP* subscription (Annual fee)
CII (Award)	£6.00	£72	£60	£40
Cert CII**	£8.50	£102	£67	£45
Dip CII***	£10.84	£130	£74	£55
ACII	£11.34	£136	£77	£60
FCII	£12.67	£152	£100	£85

* A discounted membership fee is available for individuals residing in the following countries that, with the exception of those marked with †, have been categorised as 'low GDP' per capita' in the Human Development Report 2003 published by the UN Development Programme: Angola, Azerbaijan, Bangladesh, Central African Republic, Egypt, Eritrea, Ethiopia, Gambia, Georgia, Ghana, Guyana†, India, Indonesia, Kenya, Lesotho, Malawi, Moldova (Republic of), Mongolia, Myanmar (Burma), Nepal, Niger, Nigeria, Pakistan, Papua New Guinea, Rwanda, Sierra Leone, South Africa†, Sri Lanka†, Sudan, Tanzania, Uganda, Uzbekistan, Vietnam, Zambia, Zimbabwe.

** Same fee applies to Cert CII (Claims), (London Market) and (Life & Pensions).

*** Same fee applies to Dip CII (Claims).

PFS member

Level	UK subscription (Monthly fee)	UK subscription (Annual fee)
Cert PFS	£13.75	£165
Dip PFS	£13.75	£165
APFS	£13.75	£165
FPFS	£13.75	£165

SMP member

Level	UK subscription (Monthly fee)	UK subscription (Annual fee)
Cert CII(MP)	£9.58	£115
Cert CII (MP & ER)	£9.58	£115

Please note the subscription fees are reviewed each year on 1 September.