

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

- complete and submit your booking 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.

Face-to-Face Training Booking form

FTF002 (11/10)

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. 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

email*

Work address

Postcode Country

Home address

Postcode Country

* Please take care when providing your email address as most correspondence will be sent electronically.

Tick address to be used for postal correspondence Home Work

Please only tick one box per category

Type of organisation

- (Insurance) Insurance company Broker/Intermediary Lloyd's Reinsurance company/broker
 Loss adjuster/Loss assessor Bank/Building Society Consultancy Legal
 Other

- (Financial Advice) Independent financial adviser Independent financial adviser – Network Whole of market Multi-tied
 Tied agent (Sole agent) Company (insurer/assurer) back office Bank/Building Society back office Mortgage adviser
 Investment house Other

Area of work

- (Insurance) Underwriting Claims/Loss adjusting Broking Sales/Marketing
 Risk management Administration Compliance HR/Training
 Surveying Processing
 Finance Other

- (Financial Advice) Advising clients Underwriting Claims Administration/Processing
 HR/Training Compliance Finance Product selling to advisers
 Technical adviser Other

Job category

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

Please turn over

Face-to-Face Training booking form – FTF002 (11/10)

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. Go to Section C if you are already a member.)

Important note: Applying for membership now entitles you to the reduced member rates where appropriate.

I wish to apply for membership of the CII Yes No

I wish to join the following local institute – UK only (See pg 122)

Please tick the relevant box to confirm whether you have:

– Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure). Yes No

– Been convicted for (or have you been charged but not yet tried with) any offence other than a monetary fixed penalty for a motoring offence. Please note, if the conviction is considered spent under the Rehabilitation of Offenders Act you should select 'no'. Yes No

– Been subject to any disciplinary sanctions (or are currently the subject of any investigation) by the CII/PFS or any other professional and/or membership body or regulatory authority. Yes No

If you have answered 'yes' to any of these questions, please also provide any relevant details on a separate sheet of paper.

Please note that as a member of the CII, you are required to let us know if you are made bankrupt; become the subject of an individual voluntary arrangement (or similar procedure); are convicted of any offence other than a monetary fixed penalty for a motoring offence; or have any disciplinary sanctions applied to you by another professional and/or membership body or regulatory authority.

Referral to Membership Application Sub-Committee. The CII reserves the right to refer such membership applications to the CII Membership Application Sub-Committee (MASC) which is a Sub-Committee of the CII Disciplinary Committee as in its absolute discretion it considers appropriate to so refer. A non-exhaustive list of instances where applications will normally be referred to MASC are where applicants have a history of bankruptcy, an individual voluntary arrangement (or a similar procedure), a criminal conviction, a disciplinary record (with either the CII or another body) or they have failed to comply with the CII's CPD requirement in the past.

In becoming a member of the Chartered Insurance Institute (CII), I agree to abide by: the CII Charter and Bye-laws; the CII Code of Ethics; all CII rules and regulations; the constitution and Bye-laws of any local institute of which I become a member; and the CII's Continuing Professional Development scheme (only applicable to qualified members). Yes

You must answer the questions on this form truthfully, including the declarations you make. Any information you provide which is misleading or untrue may result in your membership being cancelled. It may also lead to disciplinary or criminal proceedings. If there are any questions or any parts of the declarations on this form which you do not understand then you can refer to the CII website www.cii.co.uk/explanatorynotes although the CII do not accept any liability for information or clarification given.

Faculties

Please choose below which faculty 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**. If you wish to join additional faculties please contact CII Customer Service on +44 (0)20 8989 8464.

(select one)

Insurance Broking Claims London Market Underwriting Life & Pensions
(For general insurance company employees)

Membership fees

1. An admission fee of £36 is payable by **ALL** applicants.

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

	London only*	UK and Channel isles	International**
Annual Subscription	£73	£70	£50
Monthly Subscription	£6.09	£5.84	n/a

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 income' or 'lower middle income'. See page 122 for details.

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

- by monthly 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. The admission fee will be spread across your 12 monthly payments.**
- by cheque or debit/credit card. **If you choose this option please enter the correct amount in the sub total box, including the admission fee.**

Sub total £

(to include the
£36 admission fee)

Face-to-Face Training booking form – FTF002 (11/10)

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 £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

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Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Face-to-Face Training booking form – FTF002 (11/10)

Enter your name

Section D – Declarations

I declare that all information provided by me on this form is true and correct to the best of my knowledge.

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. By submitting this application, I consent to the CII processing my data. Full details are included in the CII Data Protection and Privacy statement which is available on the CII's website.

Sharing information with your employer

The CII will, upon the employer's request, provide your employer with details of your examination record, including attempts, along with your CII Personal Identification Number unless you tick this box.

Privacy and electronic communications regulations

We may from time to time wish to draw your attention to other CII products and services electronically which are likely to be of interest to you. The CII will assume that you consent to us using your data in this way, unless you tick the following box.

Sharing your data with third parties

The CII Group will never sell your data to third parties for commercial gain. We may, however, share your data with third parties who provide products and services that complement those offered by the CII. The CII will assume that you consent to us using your data in this way, unless you tick the following box.

Terms, conditions and cancellation

I have read and agree to the terms and conditions contained in this brochure.

Your right to cancel

In accordance with The Consumer Protection (Distance Selling) Regulations 2000 you have a right of cancellation in respect of these products and services. This right shall (subject to the Regulations) expire seven working days from the day after the date on which either the products are received by you or your order for services is accepted by the CII. Should you wish to cancel, notice should be sent to Customer Service. Where products have been supplied to you prior to cancellation they must be returned to us, in the condition in which they were supplied at your expense. Reimbursement for any monies paid by you for the product or service will be made within 30 days of receiving notice of cancellation or, if products are returned to us within 30 days of their receipt.

In the event that less than seven days' notice of cancellation of a Certificate exam entry is given and the CII incurs irrecoverable cost as a result then it may recover that cost from you.

You must answer the questions on this form truthfully, including the declarations you make. Any information you provide which is misleading or untrue may result in your membership being cancelled. It may also lead to disciplinary or criminal proceedings. If there are any questions or any parts of the declarations on this form which you do not understand then you can refer to the CII website www.cii.co.uk/explanatorynotes although the CII does not accept any liability for information or clarification given.

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

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Enter your name

Section E – Total payable and method of payment

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

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

Total payable £

I would like a payment receipt to be emailed to me (please be sure to provide your email address on the first page of the form).

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 recorded delivery. 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).

Invoice (Existing corporate accounts holders can submit their bookings via email at application@cii.co.uk giving their account details. For non-account holders if you wish to be invoiced please submit your booking on headed company paper).

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 MAESTRO SOLO

Valid from* Expiry date* Issue number* (Solo/Maestro only)

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 CII, Customer Service, 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 D 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 (Bank/Building Society)
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.

9 9 6 6 4 5

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.