



Important note:

- Before completing this form please read the full guidance notes at www.cii.co.uk/individual-accreditation
Failure to read the guidance notes, or to supply all the information requested, may result in a delay in processing your application.
- To ensure that your application is processed correctly, please enter your name at the top of each page in the space provided.

Individual prior learning accreditation form

IPLA/001

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.'

Section A – Personal details (Please complete all fields. Your name should be entered as you wish it to appear on all CII official documents)

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 Mob

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 correspondence Home Work

Please only tick one box per category

Type of organisation/role

- | | | | | |
|------------------------------------|---|--|--|--|
| Insurance | <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 | | | |
| Financial Services | <input type="checkbox"/> Independent financial adviser | <input type="checkbox"/> Independent financial adviser – Network | <input type="checkbox"/> Whole of market | <input type="checkbox"/> Multi-tied |
| | <input type="checkbox"/> Tied agent (Sole agent) | <input type="checkbox"/> Company (insurer/assurer) back office | <input type="checkbox"/> Bank/Building society back office | <input type="checkbox"/> Mortgage adviser |
| | <input type="checkbox"/> Investment house | <input type="checkbox"/> Other | | |
| Mortgage | <input type="checkbox"/> Mortgage intermediary | <input type="checkbox"/> Network | <input type="checkbox"/> Packager | <input type="checkbox"/> Independent financial adviser |
| | <input type="checkbox"/> Estate agent | <input type="checkbox"/> Accountant | <input type="checkbox"/> Insurance broker | <input type="checkbox"/> Bank |
| | <input type="checkbox"/> Building society | <input type="checkbox"/> Specialist lender | <input type="checkbox"/> Insurance company | <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 | | |
| Financial Services/Mortgage | <input type="checkbox"/> Advising clients | <input type="checkbox"/> Underwriting | <input type="checkbox"/> Claims | <input type="checkbox"/> Administration/Processing |
| | <input type="checkbox"/> HR/Training | <input type="checkbox"/> Compliance | <input type="checkbox"/> Finance | <input type="checkbox"/> Product selling to advisers |
| | <input type="checkbox"/> Technical adviser | <input type="checkbox"/> Other | | |
| Job category | <input type="checkbox"/> Administrative | <input type="checkbox"/> Technical | <input type="checkbox"/> Advisory | <input type="checkbox"/> Supervisory/Controller |
| | <input type="checkbox"/> Middle management (Branch, Office, Dept) | <input type="checkbox"/> Senior management (General, Head of) | <input type="checkbox"/> Executive (CEO, Director) | <input type="checkbox"/> Business owner |
| | <input type="checkbox"/> Other | | | |

