



# Individual prior learning accreditation form

**Important note:**

- Before completing this form please read the full guidance notes at [www.cii.co.uk/individual-accreditation](http://www.cii.co.uk/individual-accreditation)  
Failure to read the guidance notes, or in supplying 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.

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**

- Insurance**
- |                                                    |                                                    |                                     |                                          |
|----------------------------------------------------|----------------------------------------------------|-------------------------------------|------------------------------------------|
| <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                                    |                                                               |                                                    |                                                 |

Enter your name

## Section B – Qualifications held

Please note that in order to be eligible for CII accreditation of prior learning, your non-CII qualification must match at least 80% of the syllabus and 70% of the assessment format of a current CII examination unit. All syllabuses for CII units can be found at [www.cii.co.uk](http://www.cii.co.uk) under the relevant qualification sections.

In line with other professional bodies, academic qualifications (e.g. University degrees, HNDs etc) completed more than 10 years ago will not be considered for Accreditation. Please refer to the CII website [www.cii.co.uk/individual-accreditation](http://www.cii.co.uk/individual-accreditation) for further details of the accreditation rules and requirements.

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

Qualifications/examinations held • Please use exact wording as it appears on your certificate(s) • Please state your qualification title, not just your professional designation. Accreditation cannot be awarded for exemptions made by another awarding body.	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 current member of the CII or the Personal Finance Society, or a local, associated or affiliated institute official, whose CII PIN should also be provided (where applicable). Alternatively, a public notary may certify these documents as true copies, providing their full name and company address.
- 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 that the photocopy is a true representation.
- Self-certified documents will not be accepted.

If you are working towards a CII qualification, please indicate the type of qualification: General Insurance  Financial Services  (please tick one only)

## Section C – Fees

Please refer to [www.cii.co.uk/individual-accreditation](http://www.cii.co.uk/individual-accreditation) for a guide to fees, however **please do not send payment at this time.** If you are granted any 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 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

Please send this form to **CII Customer Service, CII, 42 - 48 High Road, South Woodford, London E18 2JP**

For any queries please refer to [www.cii.co.uk/individual-accreditation](http://www.cii.co.uk/individual-accreditation) or call +44 (0)20 8989 8464