

Reference:
(CII use only)

Please refer to the Notes & Fees for Membership leaflet that accompanies this form.



Application for Retired Membership scheme

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

email

For every email address we receive, we will donate 10p towards Trees for Life reforestation programme in the Scottish Highlands. (see note 1)

Employer name

Job title

Work address

Postcode Country

Home address

Postcode Country

Address to be used for correspondence Home Work

Section B – Scheme options

Please tick which option you are applying for (if you are unsure how long you have been a member you can call Customer Service on CII +44 (0)20 8989 8464 or PFS +44 (0)20 8530 0852, who will be able to help).

Currently hold or have held membership for less than 20 years – **£40 a year.**

Currently hold or have held membership for 20 years or more (continuously) – **£20 a year.**

If the Insurance Institute of London is your local institute you will pay an additional £3 a year

Section C – Fees and method of payment

Option 1 - Monthly payment by Direct Debit

If you do not currently pay by Direct Debit and you live in the UK, you can spread the cost of membership by paying via monthly Direct Debit at no extra cost.

You will pay half the annual subscription (option 1 only)

If the Insurance Institute of London is your local institute you will continue to pay an additional £3 a year, which will be spread monthly.



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.

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

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (CII PIN)

Section C – (continued)

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.

Section D – Declaration

I am or have been a member of the Chartered Insurance Institute/Personal Finance Society.

Unqualified members only: I have been a member of the Chartered Insurance Institute/Personal Finance Society during the last three years from the date of this application.

I have fully retired from active business life in the insurance and financial services industry and would like to become retired member of the Chartered Insurance Institute/The Personal Finance Society and understand that I should not use my designation or chartered title to indicate to the public or otherwise that I am a practising professional in the insurance and financial services industry

In continuing my membership of the Chartered Insurance Institute (CII), I agree to abide by the Charter and Bye-laws and Code of Ethics of the Institute and by the Constitution and Bye-laws of any local institute of which I may be a member. If at any time I cease to be a member of the CII, I undertake to return any certificate of membership.

For Personal Finance Society members only: In continuing my membership of the Personal Finance Society I agree to the Personal Finance Society, Memorandum Articles of Association and Bye-laws and 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.

I will advise the Chartered Insurance Institute/The Personal Finance Society if I return to paid employment within the insurance and financial services industry. I understand that I must pay the relevant subscription for the period of employment and comply with requirements of the Continuing Professional Development programme.

I have read all the notes and agree to abide by the rules of the scheme.

Bankruptcy and Individual Voluntary Arrangements: Have you ever been made bankrupt or been the subject of an individual voluntary arrangement (or any such similar procedure)? Yes No If yes, please give details on a separate sheet of paper.

Criminal convictions: Do you have any convictions for any offence other than a monetary fixed penalty for a motoring offence which are not yet spent under the Rehabilitation of Offenders Act or have you been 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 similar procedure) or are convicted of any offence (other than a motoring offence with a monetary fixed penalty) in the future.

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.

Electronic communications regulations: 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. The CII will assume that you consent to us using your data in this way, unless you tick the following box

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 in this form, which right shall (subject to the Regulations) expire 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 CII receiving the notice of cancellation.

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 declaration 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.

Signature

Date

Notes

1. **Help us make a difference by providing us with your email 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 email address, please log onto www.cii.co.uk/amend or www.thepfs.org/amend or telephone CII on +44 (0)20 8989 8464 or PFS on +44 (0)20 8530 0852.

2. **Retired Membership** is open to all past and present members, (with the exception of those non-qualified members who have not been a member for at least a three year period) who **have fully** retired from active business in the insurance and financial services industry. Members wishing to apply for retired status should do so as soon as possible so that records can be amended before the commencement of the next subscription period. Applications will be accepted for a discretionary 3 months after a subscription is due, after which it will be necessary for the full subscription to be paid and applications will be processed to begin at the start of the next subscription period. Retired status cannot be backdated to previous subscription periods. Members retiring during a subscription period must pay the full subscription for that period and the rate for retired membership will change to start at the beginning of the next subscription period.

If a retired member allows their membership to lapse or resigns, it may be reinstated on completion of a new retired membership application form. Payment of the standard re-admission fee in addition to the appropriate subscription for the period in which reinstatement takes place will be applied.

Retired members who hold qualified status are reminded that if they allow their membership to lapse or decide to resign it, they would no longer be entitled to use any designatory letters or Chartered Title.

You may be subject to disciplinary investigations by the CII if you fail to comply with any of the declarations as stated.

3. **Fees:** Subscription fees are revised annually. Members with less than 20 years membership; £40. Members with 20 years or more continuous membership; £20. Continuous membership also accrues within the continued membership scheme.

4. **Direct Debit:** You can elect to pay your annual membership fee by Direct Debit using the instruction overleaf. We may retain the instruction and, if we do so, details will be passed to your bank electronically. Any changes in the membership rate will be subject to all the usual safeguards laid down in the Charter & Bye-Laws.

It is recommended that all members who have a UK current account should pay their membership by monthly Direct Debit.

The Chartered Insurance Institute

CII Customer Service, 42-48 High Road, South Woodford, London E18 2JP.

Telephone +44 (0) 208 989 8464 Fax +44 (0) 208 530 3052

CAPP/006 Ref: CII_4580



Mixed Sources

Product group from well-managed forests and other controlled sources
www.fsc.org Cert no. SA-COC-1654 CQ
© 1996 Forest Stewardship Council