



Chartered
Insurance
Institute
Standards. Professionalism. Trust.

Election to Fellowship

Important notes:

Before completing this application form, carefully read the Fellowship guidelines.

Please type or write legibly in black or blue ink. If there is insufficient space in any part of this form, please attach extra sheets.

Please complete all sections of this form in BLOCK CAPITALS and return to:

The Chartered Insurance Institute, Fellowship Advisory Service (FAS), 42-48 High Road, South Woodford, London, E18 2JP

If you require any assistance or advice when completing this form please call Customer Service on

+44 (0)20 8530 0819 or email **societies.fas@cii.co.uk**

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/Other

Surname/
Family name

Forenames/
Given name(s)

Preferred name for
CII communications

Gender (Please tick)

Male

Female

Date of birth

Daytime tel

Mobile

Employer name

Job title

Work address

Postcode

Country

Home address

Postcode

Country

email

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

Tick address to be used for correspondence (Please tick)

Home

Work

Section D - Election to Fellowship personal checklist

Please do not submit your application until you can confirm by ticking all the 'yes' boxes below to indicate that you have met all the election to Fellowship application criteria.

I confirm that I:

- | | Yes | For office use only |
|--|--------------------------|--------------------------|
| • am an Associate of the Chartered Insurance Institute | <input type="checkbox"/> | <input type="checkbox"/> |
| • hold the pre-1992 Associateship and have submitted a summary of 10 years relevant work experience | <input type="checkbox"/> | <input type="checkbox"/> |
| • am a current member of the Chartered Insurance Institute | <input type="checkbox"/> | <input type="checkbox"/> |
| • have been employed (or self-employed) in the insurance industry for at least four years | <input type="checkbox"/> | <input type="checkbox"/> |
| • am wholly or mainly engaged or employed in work connected with insurance | <input type="checkbox"/> | <input type="checkbox"/> |
| • have paid the Fellowship enrolment fee | <input type="checkbox"/> | <input type="checkbox"/> |
| • have successfully completed a Fellowship plan | <input type="checkbox"/> | <input type="checkbox"/> |
| • have successfully completed the Business Ethics Programme | <input type="checkbox"/> | <input type="checkbox"/> |
| • have three years of CPD records (These records, or a letter from the CII confirming that your records have been approved, must be attached to this application.) | <input type="checkbox"/> | <input type="checkbox"/> |
| • have completed the application for Chartered title/am a Chartered title holder/do not wish to become a Chartered title holder | <input type="checkbox"/> | <input type="checkbox"/> |
| • have attached a copy of the Enrolment for the Fellowship programme application form | <input type="checkbox"/> | <input type="checkbox"/> |
| • have signed the declarations (Section F) | <input type="checkbox"/> | <input type="checkbox"/> |

By ticking the appropriate boxes you are confirming that you have enclosed all the necessary evidence to support your application. You must include everything listed in part A and one of the options from part B.

Please do not submit your application until you are able to enclose all the supporting documentation.

Part A. I confirm that I have enclosed all of the following:

- | | | |
|--|--------------------------|--------------------------|
| • a completed and signed application form | <input type="checkbox"/> | <input type="checkbox"/> |
| • an election fee of £215 (Section E) | <input type="checkbox"/> | <input type="checkbox"/> |
| • four copies of my statement of personal development
(Please check the Fellowship guidelines to ensure that your statement includes all relevant information.) | <input type="checkbox"/> | <input type="checkbox"/> |

Part B. I confirm that I have enclosed one of the following major achievements:

- | | | |
|--|--------------------------|--------------------------|
| • evidence of a further professional or managerial qualification
(Please refer to the Fellowship regulations or letter of confirmation) | <input type="checkbox"/> | <input type="checkbox"/> |
| • four copies of my project(s) (with a signed employer's endorsement if required) (Section C) | <input type="checkbox"/> | <input type="checkbox"/> |
| • four copies of my dissertation (with a signed employer's endorsement if required) (Section C) | <input type="checkbox"/> | <input type="checkbox"/> |
| • my portfolio of published work containing four copies of each publication | <input type="checkbox"/> | <input type="checkbox"/> |

You must have successfully completed the Business Ethics Programme before applying for election to Fellowship.

Section E – Method of payment (Bacs and cheque only)

Fees – I enclose the payment of £215 election fee.

To comply with the latest Payment Card Industry Data Security Standards (PCI DSS), the CII no longer accepts credit and debit card as a payment method for paper applications. To pay by credit or debit card, please call Customer Service.

If you would like to receive a payment receipt, please tick one of the following delivery options

Email Post

(If selecting email be sure to provide your email address on the first page of the form)

Make sure you have signed and dated the declarations, and ticked a payment method.

Tick method of payment and, if applicable, complete the Bacs details.

Cheque/bankers draft drawn on a UK bank account and payable to The Chartered Insurance Institute (Please write CII PIN number if known on the reverse).

Bank transfer via Bacs (using the CII account details below and including the required information).

CII account details:

HSBC Bank plc, City of London Branch, 60 Queen Victoria Street, London, EC4N 4TR

Account number: 22271044

Sort code: 40-05-30

Swift code: MIDLGB22

IBAN: GB21MIDL40053022271044

Please include the following information so that we can identify your payment:

Date of submission Amount in sterling transferred £

Transaction reference number (if applicable) PIN

Important note: transfers can take up to two weeks to process, therefore please ensure that you submit this in sufficient time to meet any relevant closing dates. You must include any bank charges in the transfer.

How to place your order:

- **Payment by Bacs** – once your payment has been made please email all pages of this completed application form, together with your remittance advice, to accounts.receivable@cii.co.uk
- **Paying by cheque/bankers draft** – post this completed application form, along with your cheque/bankers draft to CII, Customer Service, 42-48 High Road, South Woodford, London E18 2JP

Section F – 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 will ensure that your personal data is processed in line with Data Protection legislation and the CII Data Protection and Privacy Statement (available on the CII's website). To process this application, I am deemed to have consented to the CII processing my data.

Sharing information with your employer

The CII will, upon request from your employer, provide it with details of your assessment record and accreditation including all attempts and future entries, along with your CII permanent identity number. If you **DO NOT** wish for us to provide these details to your employer, please tick the following box.

Privacy and electronic communications regulations

The CII 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. If you **DO NOT** consent to the CII using your data in this way, please tick the following box.

Sharing your data with local institutes

The CII will share your data with your local institute (UK, Channel Islands and Isle of Man based members only) so they may communicate to you, electronically, any local events, products and services that complement those offered by the CII. If you **DO NOT** consent to the CII using your data in this way, please tick the following box.

Application for study materials

I undertake to use them for my own purposes and not to sell, copy, lend or give them to anyone else.

Plagiarism

In submitting work under the Fellowship programme you are declaring that you have read the Fellowship guidelines and that it is your own work. Failure to comply with these rules may result in disciplinary action and your name being published in our Journal and Personal Finance Professional magazines and on our website.

Your right to cancel

In accordance with The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 you have a right of cancellation in respect of these Products and Services, which right shall (subject to the Regulations) expire fourteen calendar days from the day on which either the product/s are received by you, or a person nominated to receive the products on your behalf, 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 such cancellation they must be returned to us, in the condition in which they were supplied to you, at your expense. Reimbursement for any monies paid by you which relate to the cancellation will be sent to you within fourteen days of receiving the notice of cancellation or if products are to be returned to us, within fourteen days of their receipt or proof of sending.

To opt out of postal marketing communications from the CII and your local institute please send a request to Customer Service at customer.serv@cii.co.uk

Signature

Date