

Reference:
(CII use only)



Important notes:

Please read the notes below, complete this application form in BLOCK CAPITALS, and post to **CII, Customer Service 42–48 High Road, South Woodford, London E18 2JP** or fax +44 (0)20 8530 3052.

CII

Application for individual Chartered status

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/PFS permanent identity number (PIN) if known

PIN

Mr/Mrs/Miss/ Ms/Other Surname/ Family name

Forename/ Given name(s)

Gender ☐ Male ☐ Female (Please tick)

Date of birth

Tel Ext Mobile

Employer's name

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 postal correspondence ☐ Home ☐ Work (Please tick)

Please tick one box per category

Type of organisation

- | | | | | |
|--|--|---|--|--------------------------------|
| <input type="checkbox"/> Bank/Building Society | <input type="checkbox"/> Broker/Intermediary | <input type="checkbox"/> Consultancy | <input type="checkbox"/> Insurance company | <input type="checkbox"/> Legal |
| <input type="checkbox"/> Lloyd's | <input type="checkbox"/> Loss adjuster/Loss assessor | <input type="checkbox"/> Reinsurance company/broker | <input type="checkbox"/> Other | |

Area of work

- | | | | | |
|--|--|--|---------------------------------------|----------------------------------|
| <input type="checkbox"/> Administration/Processing | <input type="checkbox"/> Broking | <input type="checkbox"/> Claims/Loss adjusting | <input type="checkbox"/> Compliance | <input type="checkbox"/> Finance |
| <input type="checkbox"/> HR/Training | <input type="checkbox"/> Risk management/Surveying | <input type="checkbox"/> Sales/Marketing | <input type="checkbox"/> Underwriting | <input type="checkbox"/> Other |

Job category

- | | | | | |
|---|---|---|---|---|
| <input type="checkbox"/> Board member (CEO, Director) | <input type="checkbox"/> Business owner | <input type="checkbox"/> Middle management (Branch, Office, Dept) | <input type="checkbox"/> Senior management (General, Head of) | <input type="checkbox"/> Supervisory/Controller |
| <input type="checkbox"/> Technician/Co-ordinator | <input type="checkbox"/> Trainee | <input type="checkbox"/> Other | | |

Area(s) of specialism

(Commercial)

- | | | | | |
|--|-----------------------------------|---------------------------------------|--------------------------------------|------------------------------------|
| <input type="checkbox"/> Accident and health | <input type="checkbox"/> Aviation | <input type="checkbox"/> Construction | <input type="checkbox"/> Engineering | <input type="checkbox"/> Liability |
| <input type="checkbox"/> Marine | <input type="checkbox"/> Motor | <input type="checkbox"/> Property | <input type="checkbox"/> Travel | <input type="checkbox"/> Other |

(Personal)

- | | | | | |
|--|-------------------------------|--------------------------------|---|---------------------------------|
| <input type="checkbox"/> Accident and health | <input type="checkbox"/> Home | <input type="checkbox"/> Motor | <input type="checkbox"/> Pecuniary loss | <input type="checkbox"/> Travel |
| <input type="checkbox"/> Other | | | | |

Section B – Declarations

I wish to apply to become a:

- ☐ **Chartered Insurer** – applies to appropriately qualified CII members (see note 1) working for insurance companies and Lloyd's underwriting agents.
- ☐ **Chartered Insurance Practitioner** – applies to appropriately qualified CII members (see note 1) who work as insurance intermediaries or loss adjusters, in trade and professional bodies and in other insurance-related occupations.
- ☐ **Chartered Insurance Broker** – applies to appropriately qualified CII members (see note 1) who are carrying on business as an insurance broker. An insurance broker is an independent intermediary who acts for clients and, in respect of any product type, offers or sells the products of more than one insurer.
- ☐ **Chartered Insurance Risk Manager** – applies to appropriately qualified CII members working within the insurance sector and in the wider commercial environment who are responsible for the identification, assessment and control of risk.

In applying to become a member of the CII, I agree to be immediately bound by the CII's Charter, Bye-laws, Code of Ethics, rules, regulations and requirements of membership. I also agree to be bound by the constitution and bye-laws of any local institute of which I become a member. Full details of these obligations of membership can be found online at www.cii.co.uk/memberobligations

Please tick the relevant box to confirm whether you have:

Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure) or any judgement debt. ☐ Yes ☐ No

Been convicted for (or 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 and when, at any point in the future, your circumstances are such that you would have to answer 'yes' to any of the above.

Signed

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.

I consent to my name appearing within a searchable database of members which includes an option to view Chartered members unless I tick the following box. ☐

Sharing information with your employer

The CII will, upon request, provide your employer with details of your assessment record and accreditation including all attempts and future entries, along with your CII Permanent Identity Number, unless you 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. The CII will assume you consent to us using your data in this way, unless you 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. The CII will assume you consent to us using your data in this way, unless you tick the following box. ☐

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

Your right to cancel

In accordance with The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 ("the Regulations"), you have a right of cancellation in respect of your membership. This right (subject to the Regulations) expires 14 calendar days from the day on which your membership application is accepted or where written confirmation of your membership is received by you (please note that no refunds will be provided for cancellations made after these specified dates). Reimbursement for any monies paid by you which relate to the cancellation will be sent to you within 14 calendar days of receiving the notice of cancellation. Should you wish to cancel, notice should be sent to CII Customer Service at customer.serv@cii.co.uk

Chartered title requirements

- ☐ I confirm that I understand and will abide by the regulations for the use of Chartered title requirements (Section C).
- ☐ I confirm that, if at any time I cease to be a member of the CII, I will return any certificate of membership to the CII.

Date

Section C – Notes

1. General regulations for the use of Chartered titles

Fellows and Associates of the CII group can apply provided they:

- are applying for a title that relates to their occupation, and;
- have five years professional experience in the industry (not necessarily post-qualification) of a kind satisfactory to the Institute, and
- have passed their examinations with a combination of subjects as may be specified from time to time by the CII or approved in any individual case by the CII, and;
- are up to date with the Continuing Professional Development (CPD) requirements in accordance with CII rules.

Chartered title holders should only use the title in an individual capacity. It should not be used in a manner applying to firms, partnerships or corporate bodies. The titles must be used in full without abbreviation.

Fellows and Associates whose applications are approved will be issued with a certificate of entitlement. Any Chartered title holder whose occupation or employment changes so as to cause them to cease to be eligible shall notify the CII and return their certificate. Such notification shall not be required in the event of a temporary period of unemployment. The CII may, at its discretion, issue an appropriate new certificate, or might require further details or a renewed application for this purpose.

The Chartered Insurance Institute

CII Customer Service, 42–48 High Road, South Woodford, London E18 2JP
Tel: +44 (0)20 8989 8464 Fax: +44 (0)208 530 3052

CLFT/002 COH_J010548 (12/15)

2. Notes for applicants to Chartered status

- This Chartered title is available exclusively to members who have reached CII Associate or Fellowship level.
- Their use is conditional on due application to, and authorisation by, the CII.
- The annual membership subscription for Fellows and Associates who are granted a Chartered Insurer, Chartered Insurance Practitioner, Chartered Insurance Broker or Chartered Insurance Risk Manager title is payable at your next renewal. For details on fees please see www.cii.co.uk/memberpricing
- Five years professional experience must include at least three years employed full-time in the industry. For the purposes of this application, employment can include self-employment or working on a consultancy, contractual or voluntary basis provided the employment is full-time and is in the industry relevant to the Chartered title for which the person is applying. Professional experience for the remaining two years can include being a full time student where the primary focus of the study relates to the Chartered title for which the applicant wishes to apply.

 Chartered Insurance Institute

 @CIIGroup

www.cii.co.uk