

Reference:
(CII use only)



Important notes:

This scheme is suitable for members who have fully retired from active business life in the insurance or financial services industry. See note 1 for further details.

Please complete all sections of this form in BLOCK CAPITALS and return to:
CII Customer Service, 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 8989 8464** or email **customer.serv@cii.co.uk**

Retired membership scheme application form

Section A – Personal details

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

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 (Please tick) Male Female Date of birth

Tel Ext Mobile

Home address

Postcode Country

email

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

Address to be used for postal correspondence (Please tick) 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 CII Customer Service on +44 (0)20 8989 8464 or PFS on +44 (0)20 8530 0852, who will be able to help).

I have been a member for less than 20 years from the date of this application – £40 a year

I have been a member for 20 years or more from the date of this application – £20 a year

If the Insurance Institute of London is your local institute an additional fee of £3 a year is payable.

Section C – Payment 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.

Make your 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 or fax it to +44 (0)20 8530 3052
- **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 D – Declarations continued

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.

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

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.

I am aware that members of this scheme are not eligible to hold or to apply for a Statement of Professional Standing.

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

Date

Notes

1. Retired Membership is open to all members (provided they have been a member for at least one year prior to the date of this application), who **have fully** retired from active business in the insurance or financial services industry. Members wishing to apply for the retired membership scheme can submit an application at any time, from when their membership is due until their membership lapses. 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 unless membership is paid by monthly direct debit, in which case future payments will be adjusted accordingly.

Qualified members 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.

2. Continuing Professional Development: Retired members are not required to comply with the CII CPD scheme. If you have an outstanding request from the CII for the submission of your CPD record, you must either submit this or provide evidence that you were in fact retired during the period in question in order to be accepted onto the Retired Membership Scheme. For full details on the CII CPD scheme please visit www.cii.co.uk/cpd