

Important notes:

Please send this form, together with your documents requested in Sections B and C to **Accreditation Services, The Chartered Insurance Institute, 20 Aldermanbury, London EC2V 7HY**

For any queries and to view the trainer accreditation standards, please refer to www.cii.co.uk/traineraccreditation



CII trainer accreditation application form

TA/001

Section A – Personal details

(Please complete all fields. Your name should be entered as it appears on your passport/identity card).

If you don't have a PIN please create one at www.cii.co.uk/sign-up

Please give your CII/PFS permanent identity number (PIN)

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 name (if applicable) or name of own company

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)

See trainer accreditation standards – www.cii.co.uk/traineraccreditation

Level of accreditation sought: Introductory Intermediate Advanced

Sector: Financial Services Insurance Risk management

Section B – Trainer technical knowledge

Please select and tick one of the following subjects to write a short piece on (c.500–750 words) for a learner at the level you are applying for e.g. intro/intermediate/advanced. Where relevant, you should include examples, case law, application, monetary limits, benefits etc.

- | | | | |
|---|--|--|---|
| <input type="checkbox"/> Aim of FCA regulation | <input type="checkbox"/> Insurance contracts | <input type="checkbox"/> Injury claims | <input type="checkbox"/> Motor accident scenarios |
| <input type="checkbox"/> Negligence | <input type="checkbox"/> Strict liability | <input type="checkbox"/> Treating Customers Fairly | <input type="checkbox"/> Voidance & non-disclosure |
| <input type="checkbox"/> Liability | <input type="checkbox"/> Unit trusts | <input type="checkbox"/> The mortgage process | <input type="checkbox"/> Income protection |
| <input type="checkbox"/> Pension income options | <input type="checkbox"/> Attitude to risk | <input type="checkbox"/> Risk transfer options | <input type="checkbox"/> Enterprise risk management |

Section C – Trainer credentials

Please attach the following information and tick the box to confirm.

- | | |
|--|--|
| <input type="checkbox"/> A copy of your CV or training/employment history | <input type="checkbox"/> Certified* copies of any relevant qualifications e.g. insurance, financial planning, training etc. |
| <input type="checkbox"/> A certified* copy of your ID e.g. passport | <input type="checkbox"/> CPD records for the last 12 months |
| <input type="checkbox"/> Sample of training work delivered by you e.g. slides, workbooks, case studies etc at the technical level you are applying for e.g. Introductory, Intermediate or Advanced | <input type="checkbox"/> Details of code of ethics you adhere to |
| <input type="checkbox"/> Sample of training work designed by you | <input type="checkbox"/> Example of written work (as requested in Section B) at the level of complexity you are applying for e.g. Introductory, Intermediate or Advanced |
| <input type="checkbox"/> A minimum of two references e.g. internal client and/or a maximum of one delegate, for CII to contact | |

*If you are providing a certified copy, please ensure the person certifying is a current CII or PFS member, solicitor, public notary or official from a local, associated or affiliated institute. They will need to print their full name and CII/PFS PIN number.

If your qualification documents are not in English, the CII may require translations prior to confirming the trainer accreditation award. Please send documents in the original language, together with an English translation if already available. We will specify if further translations are needed.

Please let us know of any particular needs that you may have and we will contact you as soon as possible to discuss your requirements.

Section D – Fees

Stage 1: Initial accreditation total consists of:

- a) Application fee
- b) Investigation fee

Stage 2: Annual monitoring fee

For up to date application fee information please refer to www.cii.co.uk/traineraccreditation

- Please note that for both elements (1a) and (1b), the fees are payable on application. Should the evidence provided in the application be deemed insufficient before proceeding to investigation stage your application will be unsuccessful and the investigation fee will be refunded.
- Should your application proceed to the investigation stage and insufficient evidence be found to support the accreditation standards, your application will be unsuccessful.
- No refund will be available once your application has progressed to the investigation stage regardless of the outcome.
- Trainer accreditation is subject to an annual monitoring process and the annual monitoring fee is payable each year.
- Trainer accreditation is subject to full re-accreditation after three years.

Section E – Declarations

I apply for an award of CII accredited trainer status at the level indicated on page one.

I would like* would not like* to have my name listed on the CII website as a CII accredited trainer. (Please tick)

I agree:

- To comply with the terms of the CII trainer accreditation scheme, including the rules governing the use of the accreditation certificate;
- Not to use the accreditation in such a manner as to bring the CII into disrepute, and not to make any statement regarding the accreditation which is untrue or may be considered misleading;
- To discontinue all claims to accreditation that contain any reference to the CII or accreditation upon suspension, non renewal or withdrawal of accreditation, and to return any certificates issued by the CII;
- To notify the CII of any changes to my circumstances which relate to the CII trainer accreditation standards e.g. change of qualifications, disciplinary proceedings, etc;
- To pay the accreditation fees as detailed above;
- I have read and understood the standards.

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.

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 that you consent to us using your data in this way, unless you tick the following box.

Signed

Date

Please send this form together with your supporting evidence outlined in Section C to Accreditation Services, CII, 20 Aldermanbury, London EC2V 7HY
You may wish to email the form and supporting evidence first to accreditation@cii.co.uk

Ref: COH_J010598 TA 001 (12/15)