

Orders can be placed securely online, using a credit or debit card, by visiting [www.cii.co.uk/qualifications](http://www.cii.co.uk/qualifications) and selecting your qualification then unit.

Alternatively, call Customer Service to pay using credit or debit card, or complete this Bacs or cheque payment application form, which can be posted, or, in the case of Bacs, faxed or emailed to Customer Service.

**Important note:** To ensure that your application is processed correctly can you please enter your name at the top of each page in the space provided.

## Section A – Personal details (Please complete all fields. Your name should be entered as you wish it to appear on your certificate.)

Have you ever had previous contact with the CII? (Please tick)  Yes  No

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

Employer's name

Tel  Ext  Mobile

Work address

Postcode  Country

Home address

Postcode  Country

email\*

\* Please take care when providing your email address as most correspondence will be sent electronically. Email address must be included when ordering ebooks or other electronic products.

Tick address to be used for postal correspondence (Please tick)  Home  Work

Please tick one box per category

### Type of organisation

(Insurance)

- Bank/Building Society  Broker/Intermediary  Consultancy  Insurance company  Legal  
 Lloyd's  Loss adjuster/Loss assessor  Reinsurance company/broker  Other

(Financial services)

- Accountant  Appointed representative – Network  Appointed representative – Other  Bank/Building Society  Directly authorised advise firm  
 Mortgage broker  Product provider/Fund manager/ Service provider  Other

### Area of work

(Insurance)

- Administration/Processing  Broking  Claims/Loss adjusting  Compliance  Finance  
 HR/Training  Risk management/Surveying  Sales/Marketing  Underwriting  Other

(Financial services)

- Actuarial  Administration/Processing  Advising clients  Business Development  Compliance/Regulation  
 Finance  HR/Training  Marketing  Paraplanning  Technical  
 Other

### Job category

- Board member (CEO, Director)  Business owner  Middle management (Branch, Office, Dept)  Senior management (General, Head of)  Supervisory/Controller  
 Technician/Co-ordinator  Trainee  Other

Is your employer a member of a network or does it work with a compliance services provider?  Yes  No

If yes, please specify

## Bacs and cheque payment application form – ICI006 (10/16)

Enter your name

### Section B – Associated or affiliated institute membership

If you are a member of an institute affiliated or associated with the CII (see **page 11**) you are able to enter CII exams and purchase study materials at the same price as those charged to members of the CII. If you wish to benefit from these discounts, please confirm details of your institute membership below for validation.

Name of institute

Current membership no

Important notes:

1. These discounts are only available to current associated or affiliated members and false applications may result in exclusion from future CII exams.
2. You must provide these details with each application. Failure to do so, will result in you being charged non-member rates.

### Section C – CII membership

(Please **ONLY** complete this section if you are applying for membership. Go to Section D if you are already a member.)

I wish to apply for membership of the CII  Yes  No

In applying to become a member of the CII you agree to be immediately bound by the CII's Charter, Bye-laws, Code of Ethics, rules, regulations and requirements of membership. Full details of these obligations of membership can be found online at [www.cii.co.uk/memberobligations](http://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 have you 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 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.

#### Faculties

Please choose below which faculty you would like to join. These are forums of the CII which provide a range of services in support of individuals working in specific industry sectors – further information can be found at [www.cii.co.uk/faculties](http://www.cii.co.uk/faculties)

In applying for CII membership you can **join one faculty for free**. If you wish to join additional faculties please contact CII Customer Service on +44 (0)20 8989 8464.

(select one)

- Insurance Broking  Claims  London Market  Underwriting (For general insurance company employees)  Life & Pensions

#### Membership fees

1. An admission fee of £37 is payable by **ALL** applicants
2. Please then select the appropriate member fee.

|                                     | International | Channel Isles | Low GDP * | Sub total |
|-------------------------------------|---------------|---------------|-----------|-----------|
| Ordinary member annual subscription | £54           | £74           | £38       | £         |

\* This discounted membership fee is available to individuals resident in the following low GDP countries:

Afghanistan, Armenia, Bangladesh, Benin, Bhutan, Bolivia, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, China, Comoros, Congo (Dem. Republic of), Cote d'Ivoire, Djibouti, Egypt, El Salvador, Eritrea, Ethiopia, Gambia, Ghana, Guatemala, Guinea, Guinea-Bissau, Haiti, Honduras, India, Indonesia, Kenya, Kiribati, Korea (Dem. Peo. Republic of), Kosovo, Kyrgyzstan, Lao People's Democratic Republic, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Micronesia, Mongolia, Morocco, Mozambique, Myanmar, Nepal, Nicaragua, Niger, Nigeria, Pakistan, Papua New Guinea, Philippines, Republic of Moldova, Rwanda, Samoa, Sao Tome and Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, Sri Lanka, Sudan, Swaziland, Syrian Arab Republic, Tajikistan, Tanzania (United Republic of), Thailand, Timor Leste, Togo, Tonga, Tunisia, Uganda, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza, Yemen, Zambia, Zimbabwe.

(to include the £37 admission fee)

Enter your name

## Section D – Study options



To order your study option as an ebook put a tick in the box under the 'e' icon. If left unticked, you will receive a printed book. Visit [www.cii.co.uk/ebooks](http://www.cii.co.uk/ebooks) for more information and to download free sample chapters before ordering.

I wish to enrol for the following qualification(s):

| Qualification                          | CII use | Member | Non-member | e                        | Total |
|--|---------|--------|------------|--------------------------|-------|
| Award in Financial Planning            | AWF     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in Financial Planning (Arabic)   | AWA     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in Bancassurance                 | AWB     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in Investment Planning           | AWP     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in General Insurance             | W01     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in General Insurance (Arabic)    | W02     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in Customer Service in Insurance | W04     | £86    | £98        | <input type="checkbox"/> | £     |
| Award in General Insurance (Hong Kong) | WH1     | £86    | £98        | <input type="checkbox"/> | £     |

Sub total £

### Postage fees:

- **£7 per order:** UK, Channel Isles, Isle of Man, Republic of Ireland, Malta and Gibraltar.
- **£15 per order:** All other countries. Low GDP country residents will receive a 50% discount on postage fees.

**Please note:** These postage rates are flat fees applicable to orders from individual candidates (orders may contain more than one item). Separate fees apply to corporate bulk orders – contact Customer Service for details.

Postage fee £

## Section E – Exam entry

I wish to sit my chosen exam(s) at the following international centre (refer to **pages 11–12** for the list of available centres):

Centre name

Centre code

| Qualification                          | Please tick required<br>2017 session |                          |
|--|--------------------------------------|--------------------------|
|  | April                                | October                  |
| Award in Financial Planning            | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in Financial Planning (Arabic)   | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in Bancassurance                 | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in Investment Planning           | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in General Insurance             | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in General Insurance (Arabic)    | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in Customer Service in Insurance | <input type="checkbox"/>             | <input type="checkbox"/> |
| Award in General Insurance (Hong Kong) | <input type="checkbox"/>             | <input type="checkbox"/> |

Additional late entry fee (See pg 7) £

Exam re-sit (See pg 7) £

## Bacs and cheque payment application form – IC1006 (10/16)

Enter your name

### Section F – Total payable and method of payment (Bacs and cheque only)

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, you can order online using our secure payment gateway, which is Level 1 compliant under the PCI DSS. Alternately, call Customer Service.



**Insert the total value of all items ordered in Sections C to E.**

**Note:** All prices quoted are inclusive of VAT, where appropriate, at the current rates. Prices are subject to change without notice. Please ensure that where applicable you have included the appropriate postage fee – see Section D.

Total payable £

If you would like to receive a payment receipt, please tick one of the following delivery options (if selecting email be sure to provide your email address on the first page of the form):  Email  Post

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

- **Paying by Bacs** – once your payment has been made please email this completed application form to [accounts.receivable@cii.co.uk](mailto:accounts.receivable@cii.co.uk) or fax it to **+44 (0)20 8530 3052**.
- **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

**If you have a UK bank account you can spread the cost of membership by paying via monthly Direct Debit at no extra charge.**

Please call CII Customer Service on +44 (0)20 8530 0852 to set up a monthly Direct Debit over the phone or complete the Direct Debit mandate below, sign the declaration in Section E and return to CII Customer Service.

### Section G – 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.

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](mailto:customer.serv@cii.co.uk)

#### 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.

#### Terms, conditions and cancellation

I have read and agree to the terms and conditions contained in this brochure, including my right of cancellation.

Signature

Date

**Please allow 21 days from receipt of your correctly completed application form for delivery outside the UK.**

**Materials sent within the UK require a signature; please ensure there will be someone to accept delivery at the specified address shown on the form.**

Please fax the completed form if paying by credit/debit card on +44 (0)20 8530 3052 or send with your cheque to CII, Customer Service, 42–48 High Road, South Woodford, London E18 2JP, United Kingdom. In the interests of data security we do not recommend you send credit or debit card details by email.