



## Section C – 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.

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, 60 Queen Victoria Street, London EC4N 4TR

**Account number:** 50114723

**Sort code:** 40-11-60

**BIC:** HBUKGB4194R

**IBAN:** GB94HBUK40116050114723

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 [revenue.team@cii.co.uk](mailto:revenue.team@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 D – 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 at [cii.co.uk/dataprotection](http://cii.co.uk/dataprotection)). **To process this application, I consent to the CII processing my data.**

Use the CII website to update your contact details and preferences, selecting the types of information and services you wish to receive and to opt in or out of mailings: [cii.co.uk/mycii](http://cii.co.uk/mycii)

**Please note:** if you choose not to receive marketing emails, you will still receive transactional communications relating to your membership, qualifications, event bookings and voting rights, as well as important operational notifications relating to the CII. Where applicable, you can choose to receive these by post by logging in to [cii.co.uk/mycii](http://cii.co.uk/mycii) and updating your preferences.

### Privacy and electronic communications regulations

In order to keep you informed in a timely and cost-effective manner, the CII uses email as our principal method of communication. From time to time, we may wish to electronically draw your attention to other CII products and services which are likely to be of interest to you. **I consent to receiving marketing communications from the CII by email.**  Yes  No

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)

### Sharing your data with local institutes

CII local institutes provide access to a programme of services including CPD events, training and networking opportunities designed to support you and complement your CII membership. We will share your data with your local institute (UK, Channel Islands and Isle of Man based members only) so they may send you relevant email communications. **I consent to the CII sharing my data with my local institute.**  Yes  No

### Sharing information with your employer

The CII may receive a request from your employer to provide it with details of your assessment record and accreditation including all attempts and future entries, along with your CII permanent identity number. **I consent to the CII sharing this information with my employer.**  Yes  No

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

Signature

Date

## Section E - Regulations for the BEP

1. The cost of the programme is £95. Postage payable of £7 UK and EU. All other countries £15.
2. The programme includes the core text, guide to the business ethics model and case studies.
3. Applicants must submit evaluations of two case studies, electronically, to the CII for assessment.
4. Both evaluations must be completed to the satisfaction of CII tutors for the applicant to pass the programme.
5. If the evaluations are not acceptable, details of the areas of unacceptability will be provided in writing.
6. If unsuccessful, evaluations may be re-submitted on two further occasions without additional charge.

Please note: Completed case studies are not returned and no feedback will be given.