



Chartered  
Insurance  
Institute  
Standards. Professionalism. Trust.

# Election to Fellowship

## Important notes:

Before completing this application form, carefully read the Fellowship guidelines.

Please type or write legibly in black or blue ink. If there is insufficient space in any part of this form, please attach extra sheets.

Please complete all sections of this form in BLOCK CAPITALS and email to: **societies.fas@cii.co.uk**

If you require any assistance or advice when completing this form please call Customer Service on **+44 (0)20 8530 0819** or email **societies.fas@cii.co.uk**

## Section A - Personal details

(Please complete all fields - it is essential we have your email address as this is our main channel of contact with you)

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

PIN

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

Forenames/ Given name(s)

Preferred name for CII communications

Gender (Please tick)  Male  Female  Prefer not to say Date of birth

Daytime tel  Mobile

Employer name

Job title

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 correspondence (Please tick)  Home  Work



## Section D - Election to Fellowship personal checklist

Please do not submit your application until you can confirm by ticking all the 'yes' boxes below to indicate that you have met all the election to Fellowship application criteria.

### I confirm that I:

- am an Associate of the Chartered Insurance Institute
- hold the pre-1992 Associateship and have submitted a summary of 10 years relevant work experience
- am a current member of the Chartered Insurance Institute
- have been employed (or self-employed) in the insurance industry for at least four years
- am wholly or mainly engaged or employed in work connected with insurance
- have paid the Fellowship enrolment fee
- have successfully completed a Fellowship plan
- have successfully completed the Business Ethics Programme
- have three years of CPD records (These records, or a letter from the CII confirming that your records have been approved, must be attached to this application.)
- have completed the application for Chartered title/am a Chartered title holder/do not wish to become a Chartered title holder
- have attached a copy of the Enrolment for the Fellowship programme application form
- have signed the declarations (Section F)

Yes

For office use only

By ticking the appropriate boxes you are confirming that you have enclosed all the necessary evidence to support your application. You must include everything listed in part A and one of the options from part B.

Please do not submit your application until you are able to enclose all the supporting documentation.

### Part A. I confirm that I have enclosed all of the following:

- a completed and signed application form
- an election fee of £215 (Section E)
- a copy of my statement of personal development   
(Please check the Fellowship guidelines to ensure that your statement includes all relevant information.)

### Part B. I confirm that I have enclosed one of the following major achievements:

- evidence of a further professional or managerial qualification   
(Please refer to the Fellowship regulations or letter of confirmation)
- a copy of my project(s) (with a signed employer's endorsement if required) (Section C)
- a copy of my dissertation (with a signed employer's endorsement if required) (Section C)
- my portfolio of published work containing a copy of each publication

You must have successfully completed the Business Ethics Programme before applying for election to Fellowship.

## Section E – Method of payment (Bacs and cheque only)

**Fees** – I enclose the payment of £215 election fee.

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, please call Customer Service.

If you would like to receive a payment receipt via email, please tick the below box.

(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.

The preferred method of payment is a bank transfer via Bacs. Please use the CII account details below and include 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 F – 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.

**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 you have a right of cancellation in respect of these Products and Services, which right shall (subject to the Regulations) expire fourteen calendar days from the day on which either the product/s are received by you, or a person nominated to receive the products on your behalf, or your order for services is accepted by the CII. Should you wish to cancel, notice should be sent to Customer Service. Where products have been supplied to you prior to such cancellation they must be returned to us, in the condition in which they were supplied to you, at your expense. Reimbursement for any monies paid by you which relate to the cancellation will be sent to you within fourteen days of receiving the notice of cancellation or if products are to be returned to us, within fourteen days of their receipt or proof of sending.

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)

Signature

Date