



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Your membership guide

Develop with
➔ drive





in pursuit of public trust*

We are the leading professional body for the insurance profession and we are on a pursuit, with the support of our members, to secure and justify the confidence of the public.

Membership gives you access to a range of tools and services that support your professional development, enhance your profile and improve levels of technical competence; keeping you competitive in an ever-changing world.



*public trust is
at the heart of
all that we do...*



Standards

We play a pivotal role within the profession, setting standards for competence and influencing future direction.

As a member, you are part of a professional body that is well-known and respected by employers, regulators and your professional peers.

Professionalism

We are dedicated to promoting high standards of professionalism. At the centre is a commitment to uphold certain standards of behaviour.

Members maintain these standards by adhering to our Code of Ethics and committing to on-going learning.

Trust

Public trust is at the heart of all that we do. Our Royal Charter ensures we never lose sight of our mission.

We help to unite the profession, increasing its credibility with the government, policymakers, regulators and consumers.

*

*only 'together' we
can achieve...*

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Imagine
your future

Welcome

Membership supports your professional development, enhances your career potential and integrates you into a community of likeminded professionals.

As a member you enjoy access to a range of benefits that help to meet your clients and your employers expectations whilst allowing you to shape your career in the way that you want. Our members may each value something different from their membership, but they all look to us for the same thing: our support in helping them reach their full potential and career goals - whatever they may be.

Whether it's keeping up to date by accessing leading sector specific knowledge (see pages 14-15); strengthening your employability prospects with our profile-raising tools (see page 19); or standing out in a competitive market with Chartered status (see pages 32-33.) - we're here to help you achieve whatever it is you set out to accomplish.

This guide will walk you through some of the key aspects of membership. Take your time to explore what's available and make sure you take advantage of all that membership has to offer.

Your professional community

Offering an enhanced member experience, Societies focus on the issues that matter most in your chosen area of insurance. By joining a Society, you become part of a dedicated community of professionals that aims to raise the levels of professional knowledge and technical competence.

As an existing Chartered Insurance Institute member, you can join one of our Societies for free. Simply login to your MyCII and choose your preferred Society to get started.

Information you need

Through your Society you have access to relevant resources including good practice guides, webinar recordings, technical briefings, videos and podcasts covering an array of topics of interest.

Advance at Pace

Each Society has a set of tools and resources specifically designed to support professional development and enhance technical competence; giving you the knowledge and confidence required to make important business decisions.

Your professional Tribe

When you join a Society you become part of a growing community of like-minded professionals focused on sharing good practice and generating new ideas. Dive into meaningful conversations with those that understand the opportunities and challenges of your chosen field.

Bespoke for Brokers

The Society of Insurance Broking supports nearly 15,000 professionals working across the broking sector

sib.org.uk

Made for Mortgages

The Society of Mortgage Professionals caters for our mortgage market specialists.

smp.org.uk

United in Underwriting

If you work in the world of underwriting then there's no doubt, you'll want to join our Society of Underwriting Professionals.

soup.org.uk

Futureproofing Finances

The Personal Finance Society is the UK's leading professional body for the personal finance sector.

thepfs.org

Committed to Claims

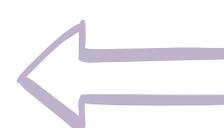
The Society of Claims Professionals welcomes all members involved in the claims and claim handling sphere.

socp.org.uk

Societies are part of the Chartered Insurance Institute. As a Society member you are still required to abide by the CII's Code of Ethics and CPD requirements. More info on pages 10 and 16.



Fuelling professional standards



Code of Ethics

We are a professional body dedicated to building public trust in insurance. Our Royal Charter requires us to secure and justify the confidence of the public.

As a member you are expected to follow our Code of Ethics, a set of principles ensuring you maintain high standards of integrity, probity and ethical fair dealings.

Our Code of Ethics sets out five core duties, that as a member we trust you will follow.

These are:

1. Comply with the Code and all relevant laws and regulations.
2. Act with ethical standards and integrity.
3. Act in the best interests of each client.
4. Provide a high standard of service.
5. Treat people fairly, regardless of: race or racial group; sex or sexual orientation; religion or belief; age; and disability.

We regularly review the Code to make sure it remains relevant and appropriate. To see the latest version in full visit, cii.co.uk/code

Enhance your understanding and appreciation of the Code by accessing our online ethics course and support materials at, cii.co.uk/ethics/practicalguide

The nitty gritty

Did you know?

Reading and reflecting on the Code of Ethics counts towards your structured CPD. See pages 16-17 for more details on CPD requirements as a member.

Increasing public confidence

Public Trust Index

Without clear thinking about what trust is and where it comes from, building trust becomes a shot in the dark. That's why we created the Public Trust Index, designed to measure consumer confidence in insurance.

What do we mean by trust?

Insurance offers protection in the face of life's unforeseen events. It's a promise to help when things go wrong and as a profession, we must reassure consumers that they can trust us to help them during difficult times. Without their trust, our promise is meaningless and insurance markets cannot function.

The Index reveals where people are confident in the profession and areas for improvement, and is based on detailed research with consumers, SMEs, insurers, regulators and public bodies.

Explore the full breadth of the research and download the latest Trust Index for insight on how you, as an insurance professional, can help to build consumer trust.

cii.co.uk/trust-index

Our promise

Each year we promise to update the Index to show how trust in insurance is evolving, helping us to identify new opportunities aimed at strengthening the credibility of the insurance profession with the public.

Delivering

on our mission

From technical knowledge to practical expertise

Enjoy content designed to enhance your knowledge and keep you ahead of the curve. As a member you can access key market information through our comprehensive collection of resources.

FutureMe

A career development platform for insurance and financial planning professionals.

FutureMe offers interactive tools and career skills e-learning, including more than 5,000 videos, 800 e-learning bites, 14 personality assessments and 300 Soft Business & IT skills courses.

<https://www.cii.co.uk/futureme/>

eLibrary

eLibrary is an online search platform that allows you to search and access eBooks, electronic articles, reports and other online resources for free. Immerse yourself in our specialist digital collection covering a range of insurance, risk and related financial services topics.

[cii.co.uk/learning/elibrary](https://www.cii.co.uk/learning/elibrary)

The Journal

The official membership magazine for the Chartered Insurance Institute, the Journal is your bi-monthly dose of the latest regulatory and market activity within the world of insurance. Every issue carries a variety of articles to keep you up-to-date with the latest trends in personal and commercial lines.

[thejournal.cii.co.uk](https://www.thejournal.cii.co.uk)

Looking for something sector specific?

Each of our Societies has their own Learning Content Hub, so you'll be guaranteed to find information that's relevant to you. Find out more on pages 8-9.

CII Radio

Relish content on the go with our dedicated podcasting channel which aims to keep you abreast with the latest topics within the sector, as well as giving you an insight into our work. We regularly launch seasons of podcasts, covering a variety of topics relevant to general insurance.

Tune in regularly, and sign up to our feeds to ensure that you don't miss an episode. The podcasts are available to Android users via SoundCloud or Stitcher Radio and via Apple Podcasts.

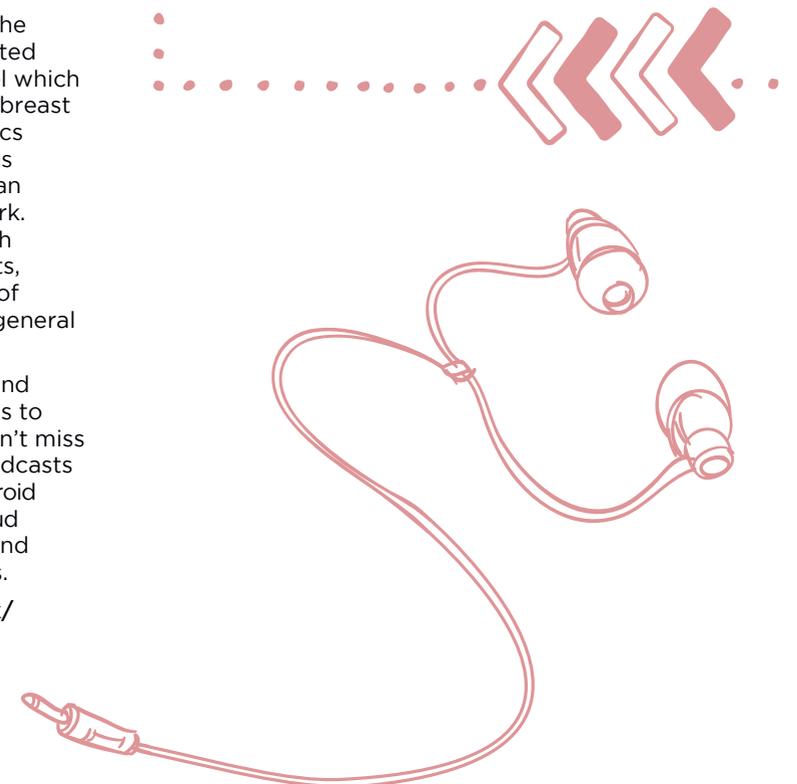
[thejournal.cii.co.uk/podcasts](https://www.thejournal.cii.co.uk/podcasts)

The home of digital content

The Learning Content Hub

For digital content that informs and inspires, whilst meeting your professional development needs, visit the Learning Content Hub. Browse, search and discover topical and business relevant resources including; good practice guides, videos, webinars, eBooks, audio-presentations, blogs and podcasts, covering a variety of topics informed and produced by some of the most influential minds in insurance.

[cii.co.uk/learning-content-hub](https://www.cii.co.uk/learning-content-hub)



Continuing Professional Development

Essential for every professional, we believe that learning and personal development should never stop. As a qualified member, you must undertake annual CPD.

In today's fast changing world, it's more important than ever to commit to ongoing learning and development so you can remain relevant in a competitive market.

Your CPD activity can help you:

- build your confidence and credibility with the public and with clients
- achieve your career goals by focusing on relevant training and development
- respond to regulatory and market changes
- improve productivity by addressing gaps in your knowledge

CPD Scheme

The CII CPD scheme provides a practical framework for ensuring development is addressed in a structured way to meet your needs and those of your employer, as well as The Chartered Insurance Institute.

The scheme requires all qualified members, based in or outside of the UK, to complete a minimum of 35 hours' CPD each year. For more information on the different types of CPD and the activities that are considered suitable, visit:

cii.co.uk/cpd-activities

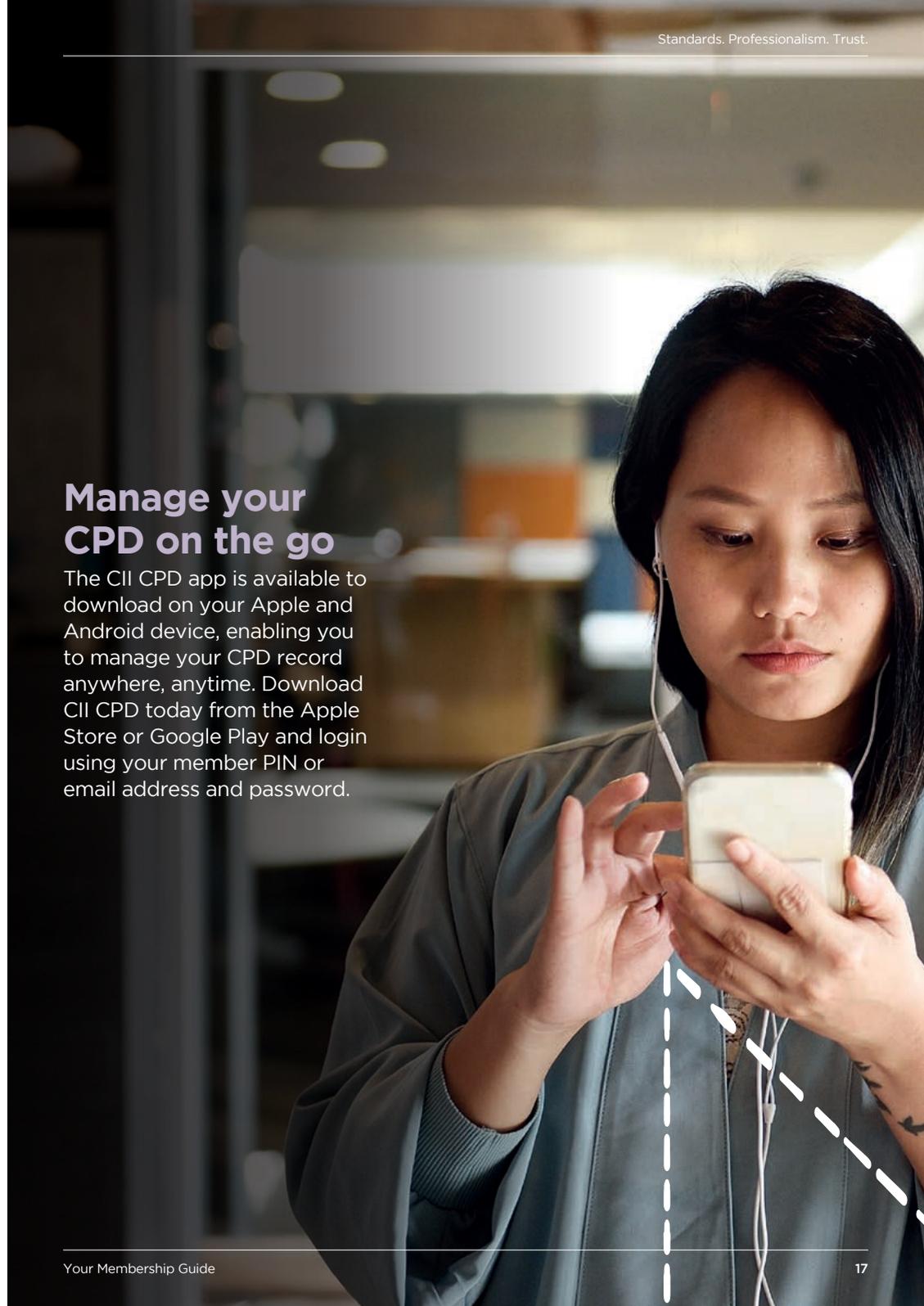
Keeping a record

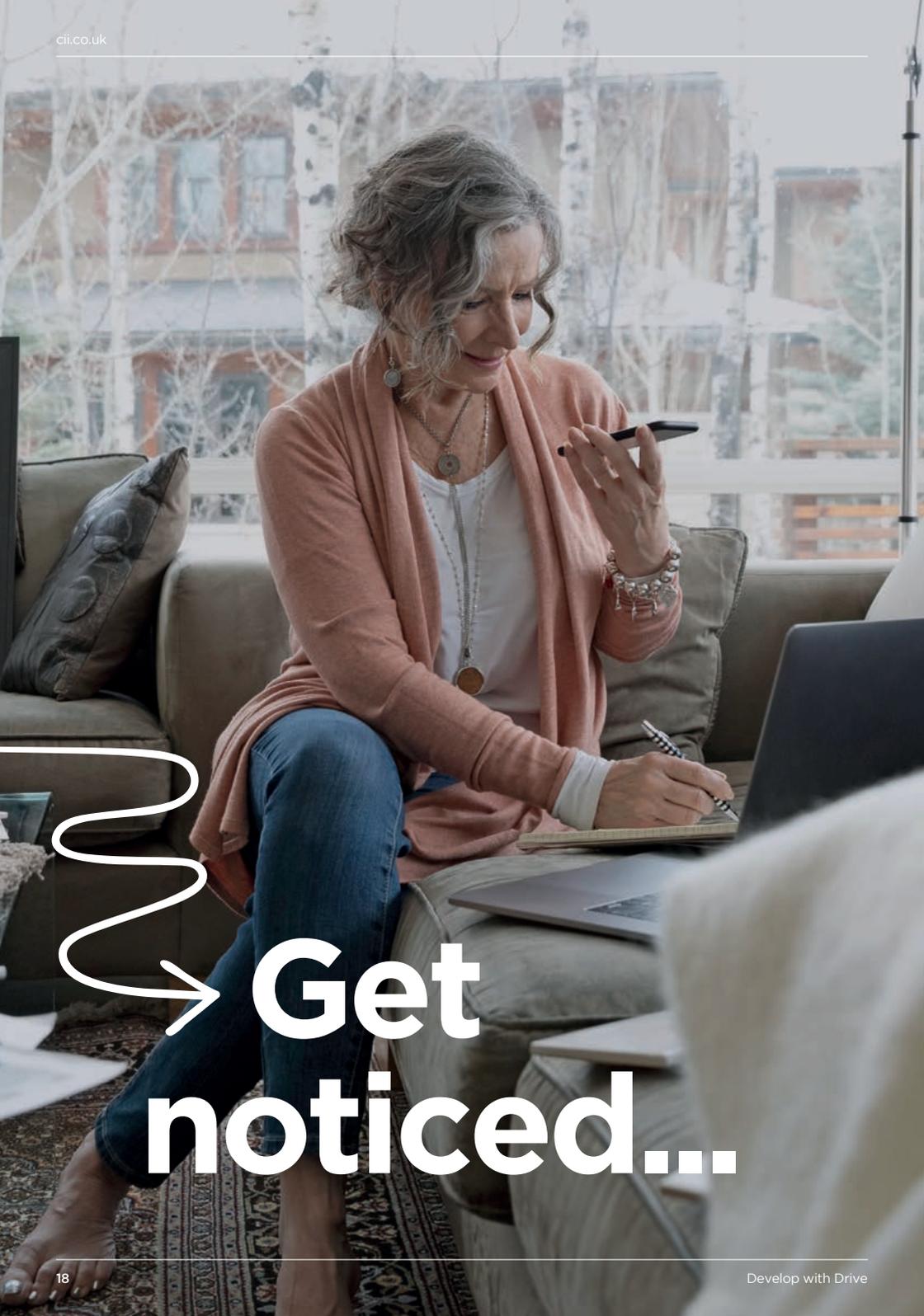
From time to time we will request a copy of your CPD record. You can use any method to record your CPD but there are some specific details you'll need to make a note of, such as; the type and duration of activities undertaken. For more on this, visit:

cii.co.uk/cpd-record

Manage your CPD on the go

The CII CPD app is available to download on your Apple and Android device, enabling you to manage your CPD record anywhere, anytime. Download CII CPD today from the Apple Store or Google Play and login using your member PIN or email address and password.





Get noticed...

Professional recognition

Our members are highly respected and recognised for their knowledge and expertise. Access a range of tools that showcase your technical competence and demonstrate your public commitment to professional standards and ethical practice.

Designations

Promote your technical competence with pride using the internationally recognised designations you have earned. Display your designations to demonstrate your commitment to professional development and adherence to clear standards of practice and behaviour. Designations can only be displayed by members and are based on the qualifications you have completed.

Find out more at, cii.co.uk/designations

Society member logo

Display your commitment to maintaining professional standards with our dedicated Society member logos. Each of our Societies have their own member logo so you can proudly exhibit your speciality as soon as you become a member of your preferred Society.

The logos can be used on various assets, including email signatures, business cards, website biographies and social media.

Digital membership cards

Showcase your credentials with digital membership cards. Cards can be saved, shared and downloaded to a desktop or mobile device and feature a unique QR code that enables digital authentication on the go.

To download your logo, visit your Society website. Find out more on pages 8-9.

More to discover... your local network

Welcome to your vibrant national network of Local Institutes. One of the core benefits of membership, our network offers an unrivalled programme of activities designed to develop your skills and help you to take your career to the next level.

You're already a member of one of our Local Institutes. When you first become a member we allocate you to your nearest one, usually close to where you live or work.

From CPD and exam workshops, to networking and social events, your Local Institute gives you access to career support and personal development opportunities that enhance your ability and raise your profile.

What's on offer:

- Technical, market and regulatory CPD events
- Soft skills and business-related training
- Social and networking activities
- Student career guidance and mentoring
- Local news and market information

Get ahead

When you tap into the activities available through your local network, you not only gain a professional advantage through access to relevant content, you also increase your visibility among local professional peers which can in turn help advance your influence within the sector.

Find out more:
cii.co.uk/local-institutes

There are 55 Local Institutes across the UK, Channel Islands and the Isle of Man.



Say hello

to more opportunities and more people...

It's where you belong

Local Institutes are about more than just the tangible benefits. Connecting with your local network creates a strong sense of belonging to something bigger and a general appreciation of being on a professional path that goes beyond the job you have now or may have in the future.

Local Institutes provide comprehensive professional support wherever your career takes you. Get involved to start your journey to a prosperous future.



Getting started

Start by opting in to receive notifications about opportunities relating to your Local Institute.

You can do this by visiting cii.co.uk/amend



Explore what's on offer

Each of our Local Institutes run their own affairs, with activities facilitated by volunteers from the area, meaning content is specific to your geographic location. To see what's happening in your neighbourhood visit your Local Institute website.

Find out more at, cii.co.uk/LI



See you there

Rest assured knowing that one of the team or wider committee will be on hand to greet you and answer any questions you have to make sure you get the most out of any session or activity you book.



Be a part of it

It's one thing to be a member of your Local Institute, but think how much more rewarding it could be to have a hand in running it.

Find out more at cii.co.uk/LI-volunteer

"By linking you to a community of professionals for support, guidance, and development, the CII's network of Local Institutes helps make careers more rewarding. Engaging with your Local Institute creates numerous opportunities for our members at a local level to meet new people, make new contacts and find new challenges. Discover what YOUR Local Institute can do for you today!"

David Irvine, National Membership and Engagement Manager, CII

Find out more at, cii.co.uk/LI

Professional Focus

Designed to complement the content offered through your Local Institute, Professional Focus is digital programme offering good practice guidance, early insight and knowledge on a range of subjects.

Professional Focus

Each month we deliver a programme of digital content developed following feedback from members. Delivered by a diverse range of highly skilled subject matter experts we explore a variety of technical and soft-skills topics.

These events are the perfect opportunity to bolster your CPD (with around 3-4 hours per month) and make new connections with others from across the profession.

The best part of all? It's all free with membership.

Find out more at cii.co.uk/professional-focus

Learn at your own pace

Keep an eye out for our monthly newsletter where we share the latest content and good practice from the programme and other activities we run. We regularly share videos, good practice guides, webinars, podcasts and more. All of which can be viewed in bite sized chunks, allowing you to manage your time whilst keeping in the loop.

What do you want to see?

We are always looking to improve the way we do things and welcome any feedback or suggestions you have on locations, the programme or topics we could explore. To share your views and ideas please get in touch by emailing professional.focus@cii.co.uk



Sharing
Knowledge,
*Promoting good
practice*

Connections that matter

Whether you're looking for career development support, or keen to share your experience to help others progress, Connect is designed to help you on your journey.

Connect is the e-mentoring programme for Chartered Insurance Institute members. The online platform makes it easy to establish and develop mentoring relationships and gives you the flexibility to choose how you would like to work together.

Become a mentor

If you are an experienced professional looking to share your knowledge and skill, register on Connect as a mentor and highlight your areas of expertise. Mentees who are interested in learning from you will request to connect, enabling you to begin your mentoring relationship.

Choose a mentor

If you are looking for professional development opportunities and want to learn from an experienced practitioner, register on connect as a mentee, and match with a mentor that can provide you with the insights that could transform your career.

Mentoring is a learning experience opportunity for both mentor and mentee, and elevates knowledge sharing to a practical level. From refining your soft-skills to mastering exam preparation techniques, there is something available for all members to benefit from.

Start your mentoring journey

To start your mentoring journey, go to the website and register in just a few simple steps. Once you have created your profile, as a mentee you can begin searching for your perfect match, and as a mentor, simply wait to be contacted.

Register online at, cii.co.uk/connect



New Gen Programme

Each year, 40 rising stars from across the insurance profession are selected to embark on our New Generation talent programme. The year-long programme seeks to develop future leaders and provides them with an opportunity to make a difference.

The New Gen programme offers a unique opportunity to make an impact on the profession whilst providing invaluable experience and exposure to key individuals from across the sector.

Culminating in the completion of a joint project which aims to transform the future of the profession, the ten individuals selected from each of the areas - Claims, Underwriting, Insurance Broking and the London Market - benefit from increased exposure to market issues and the chance to learn whilst making their mark.

Why get involved?

- network with other rising stars from the profession
- rub shoulders with key Financial Conduct Authority personnel
- meet members of parliament and learn how to handle the media

If you are interested in applying for our New Gen Programme or would like more information please visit,

cii.co.uk/new-generation-programme





Chartered professional

Chartered status is a symbol of high technical competence and signifies a public commitment to professional standards.

Attaining Chartered status is challenging, but it is achievable. Once attained the status not only changes the way people respond to you, it places you among the top professionals within your field.

As a Chartered member, you enjoy the use of the Chartered mark and designation.

For those working in insurance there are five Chartered titles:

- Chartered Insurance Broker
- Chartered Insurer
- Chartered Insurance Practitioner
- Chartered Insurance Risk Manager
- Chartered Insurance Underwriting Agent

*Enhancing your credibility,
inspiring consumer trust.*



Find out more and start your Chartered journey today, cii.co.uk/chartered

If you're an Advanced Diploma holder you may be able to apply for Chartered Status. See page 33

Qualifications

Demonstrating your technical competence is essential for your career and your credibility as a professional.

Tailoring your perfect pathway

Our insurance qualifications framework lets you plan a learning pathway to fit your current role and responsibilities as well as your career aspirations.

Qualifications contain core units intended to provide you with the essential foundations to build upon, in addition to optional units that enable you to focus your learning on what you prefer.

To view all of our qualifications, information on the qualifying criteria and what's involved, visit our website, or order our Qualifications brochure from Customer Service by emailing

customer.serv@cii.co.uk

The learning process

All of our qualification enrolments come with the essential tools to support your learning. Enrolments typically include: study text, assessment entry and access to RevisonMate, our online study tool.

We also offer additional study materials to support individual learning. These range from key fact booklets and next-edition study texts, to question packs and e-learning.

Start your learning journey today, cii.co.uk/learning

How do my qualifications affect my membership?

Our qualifications range from Level 2 to Level 6. As you progress through the qualification framework your membership type changes to reflect your level of technical competence.

To see how your status will change as you gain qualifications visit,

cii.co.uk

Your journey to

technical competence

Member discounts

Members receive exclusive discounts on study enrolments, revision aids and exam entry.



Save time and money with Perks

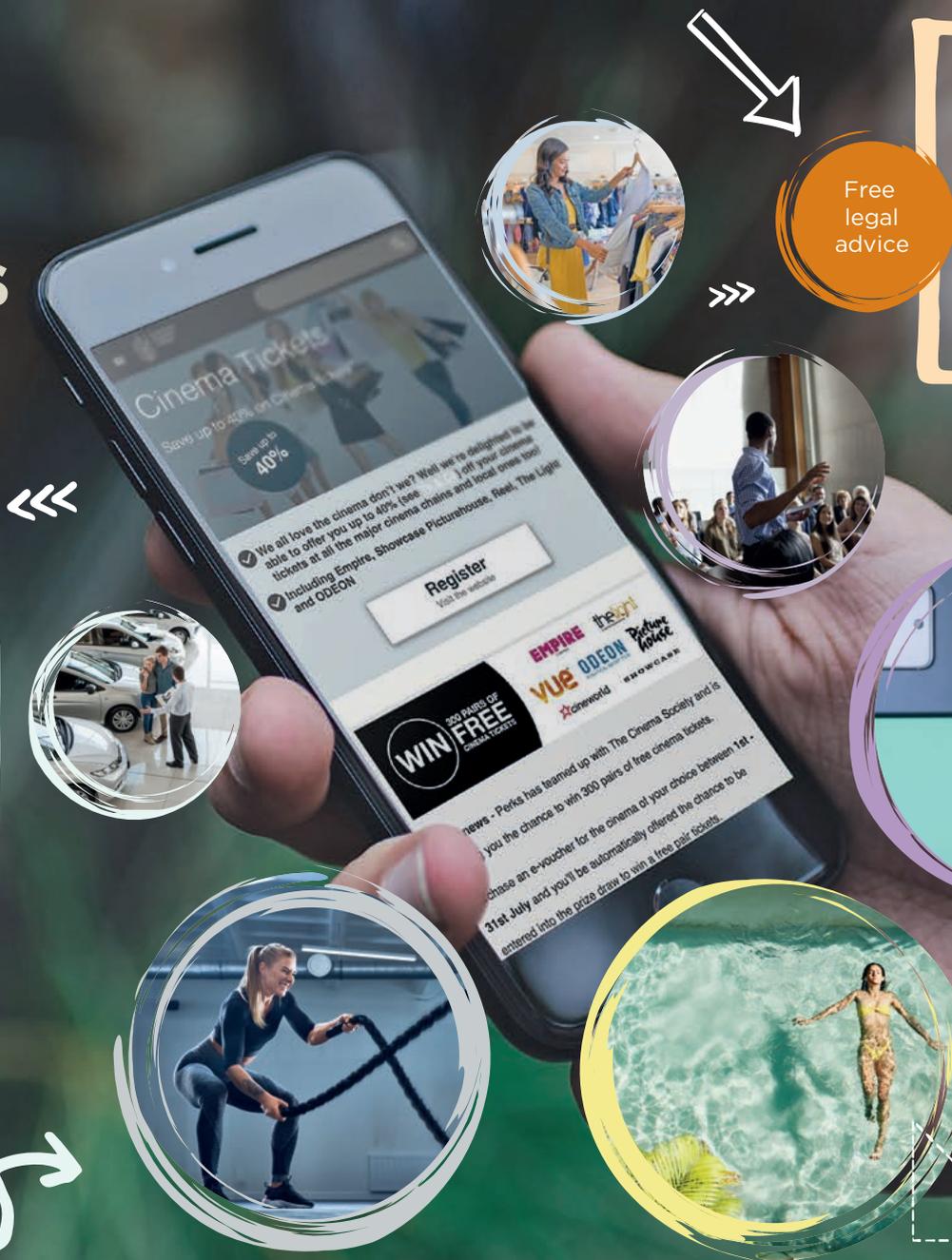
Take advantage of Perks, our affinity benefits scheme, and enjoy discounts saving you time and money on a leading range of products and services.

Perks offers discounts on high street shopping, gym memberships, cinema tickets, household utilities and more.

On average a member could **save £525 a year** through perks.

Members studying towards a qualification can apply for a TOTUM PRO student discount card and enjoy discounts on everything from eating out, fashion, health and fitness, travel and technology.

Start saving today at cii.co.uk/perks



Legal support when you need it

As a member you have access to a free legal helpline. To access advice on a range of business and personal matters simply call 01172 442 794. Calls are not limited so you can talk for as long as you like, as often as you need.

Free legal advice

Terms and conditions apply to all benefits. See website for further details. Benefits subject to change.

Please note that this services is provided by Lyons Davidson Solicitors. When you call you will need to confirm your member PIN and the nature of your call before being transferred to a specialist.

whatever the question

Got a question about your membership?

If you have a membership question you can often find the answer you need on our website, cii.co.uk. If not, please get in touch and one of the team will be happy to help.

we're always happy to help!



CII Customer Service
Chartered Insurance Institute
3rd Floor, 20 Fenchurch Street
London
EC3M 3BY
Tel: +44 (0)20 8989 8464
Email: customer.serv@cii.co.uk

Standard opening hours
8am - 6pm Monday - Friday

Telephone Service
Mon - Fri: 9am - 5pm
Closed on Saturday, Sunday
and Bank holidays



Chartered Insurance Institute 3rd
Floor, 20 Fenchurch Street
London
EC3M 3BY
Tel: +44 (0)20 8989 8464
Email: customer.serv@cii.co.uk

 [chartered-insurance-institute](https://www.linkedin.com/company/chartered-insurance-institute)

 [@CIIGroup](https://twitter.com/CIIGroup)