

# Welcome to our world!



# Discover the value of membership for free.

# Join for free

If you're serious about a career in risk or wealth management, you need to get to know the industry and the people as soon as possible.

Joining the Chartered Insurance Institute (CII) or Personal Finance Society (PFS) gives you the advantage of inside knowledge and connections to improve your chances of landing your first placement or job.

## Get your career off the ground

Membership will give you access to a range of valuable career support services, all designed to kick-start your career in risk or wealth management.

## Big benefits are yours free:

- Member-only online access to industry reports, research and publications
- Access to free UK-wide industry and networking events
- Access to free CV checking service
- Access to an exclusive LinkedIn group

As a member you'll also be eligible for our Perks discounts scheme. It gets you big savings on restaurants and high street shops, as well as cinemas, fitness and holidays.

We look forward to welcoming you to the world's largest professional body for insurance and financial services, with over 110,000 members.

**Simply complete the application form opposite and hand it back today.**

[www.cii.co.uk](http://www.cii.co.uk)  
[www.thepfs.org](http://www.thepfs.org)

### Joining criteria

Free Discover membership of the Chartered Insurance Institute or Personal Finance Society is open to school, college and university students who attend a CII education event and:

- are not in full-time employment;
- do not hold a CII qualification; and
- are not studying for a CII qualification.

**Note:** Membership will renew on the 01 September each year, effective from 2015.

You will be invited to renew providing you continue to meet the criteria specified above.

Reference:  
(CII use only)

## 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)

Mr/Mrs/Miss/ Ms/Other  Surname/ Family Name   
Forename/ Given name(s)

Gender ☐ Male ☐ Female (Please tick) Date of birth

Tel  Mobile

email

Home address

Postcode

Alternative address

Postcode

Address to be used for correspondence and local CII institute/PFS region allocation (Please see note 1) ☐ Home ☐ Alternative

## Section B – Which membership body is right for me?

Please tick one of the below to select which membership body you wish to join:

- ☐ **The Chartered Insurance Institute** – the leading professional body for the insurance sector.
- ☐ **The Personal Finance Society** – the UK's leading financial planning membership body and part of the CII Group.

## Section C – Choose a faculty

Please select a faculty you would like to join. These provide access to sector or discipline specific career support information. See note 2 overleaf for our list of faculties.

Please turn over

# Section D – Declarations

## Please complete this section in full

I am applying to be a student member of the CII/PFS as part of the Discover membership scheme. I confirm that I am a resident of the United Kingdom; I hold no CII qualifications and I have never passed any CII examinations. I note that, if my application is accepted, as a student member of the CII/PFS, I will not be entitled to vote at General Meetings of the CII/PFS.

### For CII members only

In applying to be a student member of the CII, I agree to be bound by: the CII's Charter; Bye-laws; Code of Ethics; rules and regulations and requirements of membership. I also agree to be bound by the constitution and bye-laws of any local institute of which I become a member. Full details of these obligations of membership can be found online at [www.cii.co.uk/memberobligations](http://www.cii.co.uk/memberobligations)

### For Personal Finance Society members only

By becoming a member of the PFS, I agree to be bound by the PFS Articles of Association and Bye-laws. PFS members automatically become members of the Chartered Insurance Institute (CII). I therefore also agree to be bound by the CII's Charter, Code of Ethics, rules, regulations and requirements of membership. I also agree to be bound by the constitution and bye-laws of any local institute of which I become a member. Full details of these obligations of membership can be found online at [www.thepfs.org/memberobligations](http://www.thepfs.org/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 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/PFS 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/PFS, 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.

### Data protection and privacy

The CII/PFS 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/PFS processing my data.

### Sharing your data with third parties

The CII Group will never sell your data to third parties for commercial gain. We may however share your data with third parties who provide 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. ☐

**Important note: Do NOT tick the box below if you wish to receive emails from the CII/PFS. The CII/PFS communicate with Discover members solely by email, therefore if you tick the box below you will not receive any communications.**

### Privacy and electronic communications regulations

The CII/PFS and, where relevant, your Local Institute (LI) may from time to time wish to draw your attention to other CII/PFS or LI products and services electronically which are likely to be of interest to you. The CII/PFS and your LI will assume you consent to us using your data in this way unless you tick the following box. ☐

### 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. 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)

I have read and agree to abide by the rules, terms and conditions and all associated notes of the scheme.

Signature

Date

## Notes

### 1. Local institutes/PFS regions

The network of 60 UK local institutes and 27 PFS regions are local hubs situated throughout the UK, Channel Islands and Isle of Man that deliver a range of regional services, including:

- Technical and regulatory seminars and training courses
- Career guidance, mentoring and knowledge services
- Social and networking activities
- Community engagement initiatives
- Local news and information.

### 2. Faculties

As a CII member you are able to join a faculty for free. Faculties provide access to market-relevant information and career support. More information can be found at [www.cii.co.uk/faculties](http://www.cii.co.uk/faculties)

- Insurance Broking Faculty
- Claims Faculty
- London Market Faculty
- Underwriting Faculty
- Life & Pensions Faculty

The Chartered Insurance Institute

CII Customer Service, 42–48 High Road, South Woodford, London E18 2JP

Tel: +44 (0)20 8989 8464 Fax: +44 (0)20 8530 3052