

Chartered Insurance Institute  
Standards. Professionalism. Trust.

Reference: (CII use only)

# Membership application

### Important notes:

Please complete all sections of this form in **BLOCK CAPITALS** and return to:  
CII Customer Service, 42-48 High Road,  
South Woodford, London E18 2JP

If you require any assistance or advice when completing this form please call Customer Service on **+44 (0)20 8989 8464** or email [customer.serv@cii.co.uk](mailto:customer.serv@cii.co.uk)

## Section A - Personal details

(Please complete all fields. Your name should be entered as you wish it to appear on all CII official documents.)

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

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

Forename/ Given name(s)

Preferred name

(Please enter the name you would like to be addressed by for all correspondence)

Gender (Please tick)  Male  Female  Prefer not to say Other

Employer's name

Tel  Ext  Mobile

Work address

Postcode  Country

Home address

Postcode  Country

Mandatory - please take care to enter this correctly as we will be unable to process your application without a valid email address.

Primary email

Alternative email

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

Please tick one box per category

### Type of organisation

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

### Area of work

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

## Section A – Personal details continued

### 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

### Area(s) of specialism (Commercial)

- Accident and health    
  Aviation    
  Construction    
  Engineering    
  Liability  
 Marine    
  Motor    
  Property    
  Travel    
  Other

### (Personal)

- Accident and health    
  Home    
  Motor    
  Pecuniary loss    
  Travel  
 Other

## Section B – Levels of membership

Your membership level will be allocated based on your qualification history with the CII. Please tick the relevant box below:

- Ordinary** – I do not currently hold a CII insurance qualification.
- CII (Award)** – I hold the Award in General Insurance.
- Cert CII** – I hold the Certificate in Insurance.
- Cert CII (Claims)** – I hold the Certificate in Insurance including one of: (IF4) Insurance claims handling process, (M85) Claims practice or (820) Advanced claims. I also wish to join the Claims Faculty.
- Cert CII (Customer Service)** – I hold the Certificate in Insurance, including the unit (IF9) Customer service in insurance.
- Cert CII (FS)** – I hold the Certificate in Financial Services (General route) or Certificate in Regulated Financial Services Operations and do not hold the Certificate in Life and Pensions.
- Cert CII (Health and Protection)** – I hold the Certificate in Insurance including the compulsory unit IF1 and two of the specified health and protection units. I am also employed in the health and protection market.
- Cert CII (Insurance Broking)** – I hold the Certificate in Insurance, including one of: (I10) Insurance broking fundamentals, (M81) Insurance broking practice or (930) Advanced insurance broking.
- Cert CII (Life & Pensions)** – I hold the withdrawn Certificate in Life and Pensions or Certificate in Financial Services (Life and Pensions route) and am employed in an administrative, technical or support function in the Life and Pensions sector. I also wish to join the Life & Pensions Faculty.
- Cert CII (London Market)** – I hold the Certificate in London Market Insurance or Certificate in Insurance, including units LM1 and LM2 (or LLMIT prior to 01 July 2010).
- Dip CII** – I hold the Diploma in Insurance or equivalent.
- Dip CII (Claims)** – I hold the Diploma in Insurance including one of: (M85) Claims practice, or (820) Advanced claims. I also wish to join the Claims Faculty.
- ACII** – I hold the Advanced Diploma in Insurance or equivalent.
- FCII** – I have been awarded the CII Fellowship.

## Section C – Local institute membership

If you live in the UK, Channel Islands or Isle of Man you will automatically become a member of a local institute. Local institute membership provides you with access to a programme of services including CPD events, training and networking opportunities. A full listing of local institutes is provided within the additional notes at the end of this form. Please add your preference in the box provided below to ensure you join the institute most convenient to you.

I would like to join:

**Please note:** If you choose to leave this section blank you will be allocated a local institute based on your work address. If you choose to join the Insurance Institute of London, your subscription fee will be £3.00 higher.

## Section D – Subscription fees

Please select the appropriate fee from the table provided within the additional notes at the end of this form and insert in the box provided below:

- |   |                                     |
|---|-------------------------------------|
| <input type="checkbox"/> Admission fee (payable by all new and reinstating members) | <input type="text" value="£37.00"/> |
| <input type="checkbox"/> Subscription fee   | <input type="text"/>                |
| <input type="checkbox"/> Insurance Institute of London fee (if applicable)          | <input type="text" value="£3.00"/>  |
| <b>Total</b>  | <input type="text"/>                |



## Section F - Declarations

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and financial planning professions. Suitability for membership is assessed based on completion of the below declarations. This is part of our commitment to high professional standards.

In applying to become a member of the CII, I agree to be immediately bound by the CII's Charter, Bye-laws, 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 [cii.co.uk/memberobligations](http://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 judgment debt.  Yes  No

Been subject to an adverse judgment of any court (or been charged but not yet tried with) any criminal 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 whilst 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.

### 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

### 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

# Additional notes

## Local institutes

A full listing of local institutes is provided below.

Aberdeen; Bedford & Milton Keynes; Birmingham; Blackburn & Burnley; Bolton; Bournemouth; Bradford; Bristol; Cambridge; Cardiff; Carlisle; Chelmsford & S Essex; Cheltenham & Gloucester; Chester & North Wales; Coventry; Edinburgh; Exeter; Glasgow; Guernsey; Guildford; Halifax; Hull; Inverness, the Highlands & Islands; Ipswich; Suffolk & N Essex; Isle of Man; Jersey; Kendal; Leeds; Leicester; Lincoln; Liverpool; London; Luton & Hertfordshire; Manchester; Mid Kent; Middlesbrough; Newcastle-upon-Tyne; Northampton; Northern Ireland; North Downs; Norwich; Nottingham; Perth & Dundee; Peterborough; Plymouth & Cornwall; Preston & Blackpool; Reading; Royal Tunbridge Wells; Sheffield; Shropshire & Mid Wales; Southampton; Stoke-on-Trent; Stratford-upon-Avon; Sussex; Swansea & West Wales; York

Further details of all institutes can be found at [cii.co.uk/local](http://cii.co.uk/local)

## Subscription fees 2019

The following subscription fees are applicable from 01 January 2019 to 31 December 2019. In addition to these fees, a one-off admission fee of £37 applies to all new and reinstating members.

Member level	UK monthly fee	UK annual fee	International annual fee	Low GDP* annual fee
CII Ordinary	£6.62	£79.00	£57.00	£40.00
CII (Award)	£7.00	£84.00	£62.00	£46.00
Cert CII**	£10.62	£127.00	£87.00	£52.00
Dip CII***	£14.24	£170.00	£103.00	£65.00
ACII	£15.00	£180.00	£106.00	£76.00
FCII	£16.99	£203.00	£126.00	£100.00

\* A discounted membership fee is available for individuals residing in the following countries:

Afghanistan, Angola, Armenia, Bangladesh, Benin, Bhutan, Bolivia, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, Comoros, Congo (Dem. Republic of), Cote d'Ivoire, Djibouti, Egypt, El Salvador, Eritrea, Ethiopia, Gambia, Georgia, Ghana, Guatemala, Guinea, Guinea-Bissau, Haiti, Honduras, India, Indonesia, Jordan, Kenya, Kiribati, Korea (Dem. Peo. Republic of), Kosovo, Kyrgyzstan, Lao People's Democratic Republic, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Micronesia, Morocco, Mongolia, 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, South Sudan, Sri Lanka, Swaziland, Tajikistan, Tanzania (United Rep. of), Thailand, Timor Leste, Togo, Tonga, Tunisia, Uganda, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza, Yemen, Zambia.

\*\* Same fee applies to Cert CII (Claims), (Customer Service), (FS), (Health and Protection), (Insurance Broking), (Life & Pensions) and (London Market).

\*\*\* Same fee applies to Dip CII (Claims).

## Payment receipt

Payment receipts are not issued unless you specifically request one. They are not normally required for claiming UK income tax relief. If however, you do require a receipt, please call Customer Service on +44 (0)20 8989 8464 or email [customer.serv@cii.co.uk](mailto:customer.serv@cii.co.uk)

## Membership card

Your membership card will be sent once your payment has been received. If you are paying by monthly direct debit, your card will be sent after the first payment has been made.

## Membership support schemes

A number of schemes are available to support you should your circumstances change throughout your membership. These are as follows:

### Retired membership scheme

If you take full retirement from the insurance or financial planning profession you can apply to join this scheme to continue your involvement with the CII at a reduced rate.

### Continued membership scheme

If you leave the industry and would like to maintain your relationship with the CII you can apply to join this scheme which offers continued membership at a reduced fee.

### Membership support scheme

This scheme is designed to support you if you are experiencing a significant change in your circumstances. If you find yourself temporarily out-of-work through redundancy or unemployment, are on maternity leave/shared parental leave, or are unable to work through ill-health or other special circumstances, this scheme enables you to continue your membership at a reduced rate.

For further information on membership support schemes or to access an application form, visit [cii.co.uk/supportschemes](http://cii.co.uk/supportschemes)

## Continuing Professional Development

Continuing Professional Development (CPD) is activity undertaken to ensure members' skills and knowledge are up-to-date. All qualified members (those entitled to use CII designations and Chartered titles) are required to comply with our CPD scheme as a condition of their membership. Information on the CII's CPD scheme can be found at [cii.co.uk/cpd](http://cii.co.uk/cpd)


## Code of Ethics

All CII members are required to uphold clearly defined and objectively measured standards of behavior. These standards are contained within the CII Code of Ethics which all members are required to uphold as a condition of membership. This can be found at [cii.co.uk/code](http://cii.co.uk/code)

**The Chartered Insurance Institute**

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

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 **Chartered Insurance Institute**

 **@CIIGroup**

**cii.co.uk**