



Chartered  
Insurance  
Institute

Standards. Professionalism. Trust.

Reference: (CII use only)

# Membership for company arrangements

## Important notes:

Please complete all sections of this form in **BLOCK CAPITALS** and return to:  
CII Customer Service, 3rd Floor,  
20 Fenchurch Street, London EC3M 3BY

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

Mandatory - please note that you must provide at least one contact number.

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

## Section A – Personal Details continued

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

### 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 CII membership will be allocated based on your qualification history with the Chartered Insurance Institute. 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.

**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.

**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 the unit (M85) Claims practice or (820) Advanced claims.

**ACII** – I have passed the Advanced Diploma in Insurance or equivalent.

**FCII** – I have been awarded the CII Fellowship.

## Section C – Society membership

Societies are dedicated professional communities serving the needs of those in the major sectors of insurance. As a member, you can join one of our Societies for free.

Please tick which of our professional communities you would like to be part of:

Society of Insurance Brokers      Society of Underwriting Professionals      Society of Claims Professionals

## Section D - Local Institute membership

When you join, you'll also automatically become a member of a local institute. Run by member volunteers, each institute offers access to events, training and social activities dedicated to engaging and supporting local members. 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 E - 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 judgement debt.	Yes	No
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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
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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
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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 (e.g. new qualifications or units) 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.

#### North West

Blackburn & Burnley; Bolton; Carlisle; Chester & North Wales; Isle of Man; Kendal; Liverpool; Manchester; Preston & Blackpool;

#### Midlands

Birmingham; Coventry; Leicester; Lincoln; Northampton; Nottingham; Shropshire & Mid Wales; Stoke-on-Trent; Stratford-upon-Avon;

#### Scotland/Northern Ireland

Aberdeen; Edinburgh; Glasgow; Inverness, the Highlands & Islands; Northern Ireland; Perth & Dundee;

#### North East

Bradford; Halifax; Hull; Leeds; Middlesbrough; Newcastle-upon-Tyne; Sheffield; York

#### Anglia

Bedford & Milton Keynes; Cambridge; Chelmsford & S Essex; Ipswich, Suffolk & N Essex; Luton & Hertfordshire; Norwich; Peterborough;

#### London

London

#### South West

Bristol; Cardiff; Cheltenham & Gloucester; Exeter; Plymouth & Cornwall; Swansea & West Wales;

#### Southern

Bournemouth; Guildford; North Downs; Reading; Royal Tunbridge Wells; Southampton; Sussex; Guernsey; Jersey; London; Mid Kent;

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

### Membership card

Your digital membership card will be available to download from your members area once your payment has been received.

### 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/learning/cpd](https://cii.co.uk/learning/cpd)

### Code of Ethics

All CII members are required to uphold clearly defined and objectively measured standards of behaviour. 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](https://cii.co.uk/code)

### The Chartered Insurance Institute

CII Customer Service, 3rd Floor, 20 Fenchurch Street, London EC3M 3BY  
Tel: **+44 (0)20 8989 8464**

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