



Society of
Mortgage
Professionals

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:
**SMP 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 **info@smp.org.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/SMP 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

Accountant	Bank/Building Society	Estate agent	Independent adviser	Insurance broker	
Insurance company/ Product provider	Mortgage intermediary	Network	Packager	Specialist lender	Other

Area of work

Actuarial	Administration/ Processing	Advising clients	Business Development	Compliance/Regulation	
Finance	HR/Training	Marketing	Paraplanning	Technical	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 SMP membership level will be allocated based on your qualification history with the CII. Please tick the relevant box below:

Ordinary member – I do not currently hold the CII's Certificate in Mortgage Advice (or its predecessor MAQ) or the CII's Certificate in Equity Release.

Cert CII (MP) qualified member – I hold the CII's Certificate in Mortgage Advice (or its predecessor MAQ).

Certs CII (MP & ER) qualified member – I hold the CII's Certificate in Equity Release.

Cert SMP qualified member – I hold the CII's Certificate in Advanced Mortgage Advice.

Section C – Local Institute

When you join, you'll 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. We will automatically allocate you to a region that aligns with your local institute preference.

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 – Declarations

The Society of Mortgage Professionals (SMP) is a part of the CII Group. In applying to become a member of the SMP, I agree to be immediately bound by the CII Articles of Association and Bye laws. SMP members automatically become members of the Chartered Insurance Institute (CII). The 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. I therefore also 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 smp.org.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
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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/SMP 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/SMP, 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/SMP will ensure that your personal data is processed in line with Data Protection legislation and the CII Data Protection and Privacy Statement (available at ciigroup.org/dataprotection). **To process this application, I consent to the CII/SMP processing my data.**

Use the SMP 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: smp.org.uk/my-smp

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/SMP.

Privacy and electronic communications regulations

In order to keep you informed in a timely and cost-effective manner, the CII/SMP uses email as our principal method of communication. From time to time, we may wish to electronically draw your attention to other CII/SMP products and services which are likely to be of interest to you. **I consent to receiving marketing communications from the CII/SMP by email.** Yes No

To opt out of postal marketing communications from the CII/SMP and your local institute please send a request to Customer Service at info@smp.org.uk

Sharing your data with local institutes

Local institutes/PFS regions 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 and region (UK, Channel Islands and Isle of Man based members only) so they may send you relevant email communications. **I consent to the CII/SMP sharing my data with my local institute and region.** Yes No

Sharing information with your employer

The CII/SMP 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/SMP permanent identity number **I consent to the CII/SMP 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

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 ciigroup.org/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 ciigroup.org/learning/cpd/



Code of Ethics

All CII/SMP 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 ciigroup.org/code

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 @mortgagepros

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