



Chartered  
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# Membership: How to guide

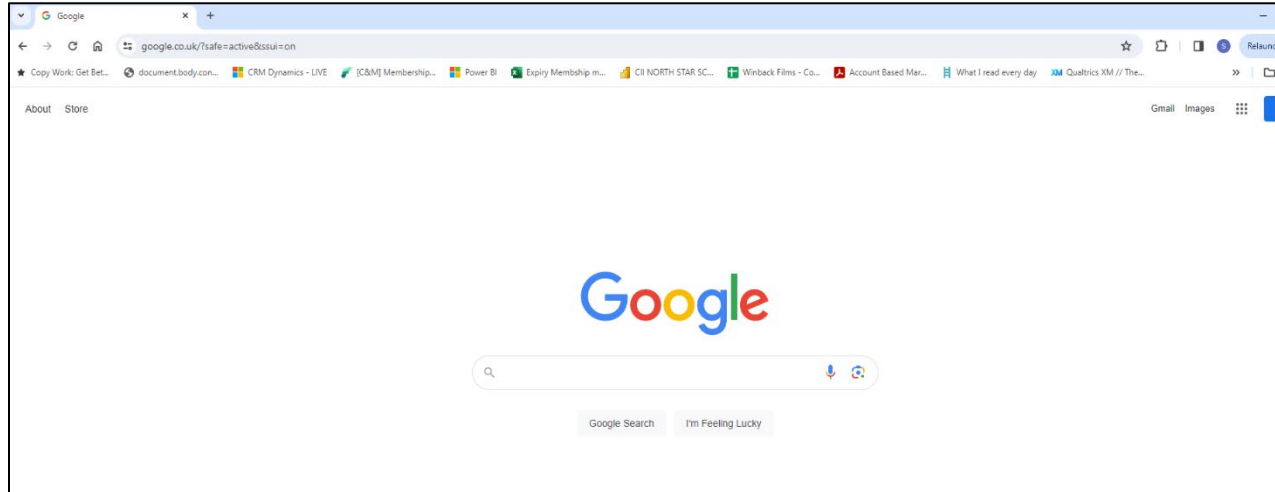
How to create or reset your  
My CII / My PFS password

# How to create or reset your CII/PFS password

This guide explains how to create or reset your CII/PFS password. Once you have set up or reset your password you'll be able to log in to the CII/PFS website and access your Member Dashboard. You can manage your membership and exam bookings from the dashboard.

1. Begin by launching your preferred internet browser on your device.

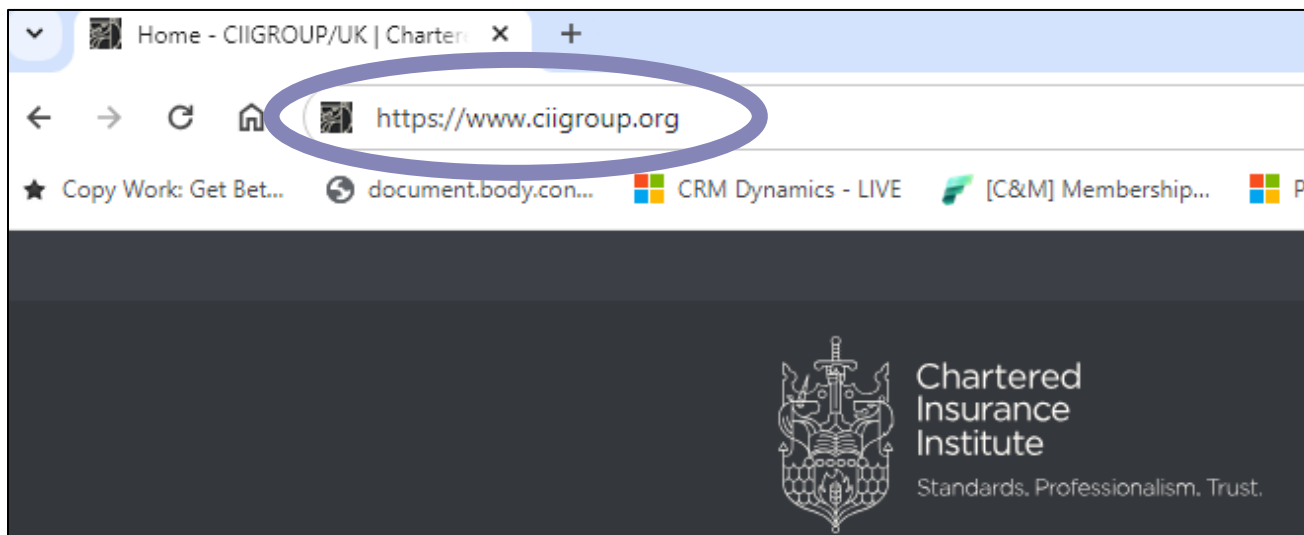
Note: For optimal performance, we recommend using Google Chrome.



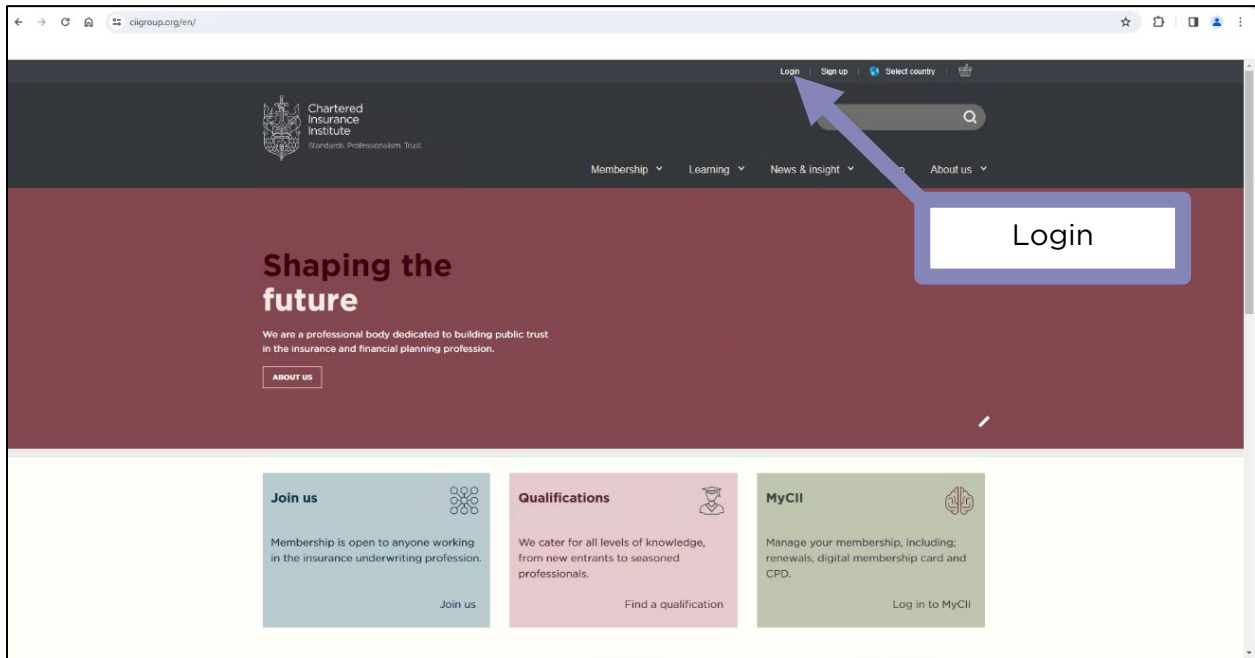
2. To access the Chartered Insurance Institute (My CII) website go to, [www.ciigroup.org](https://www.ciigroup.org).

To access the Personal Finance Society (My PFS) website go to, [www.thepfs.org](https://www.thepfs.org)

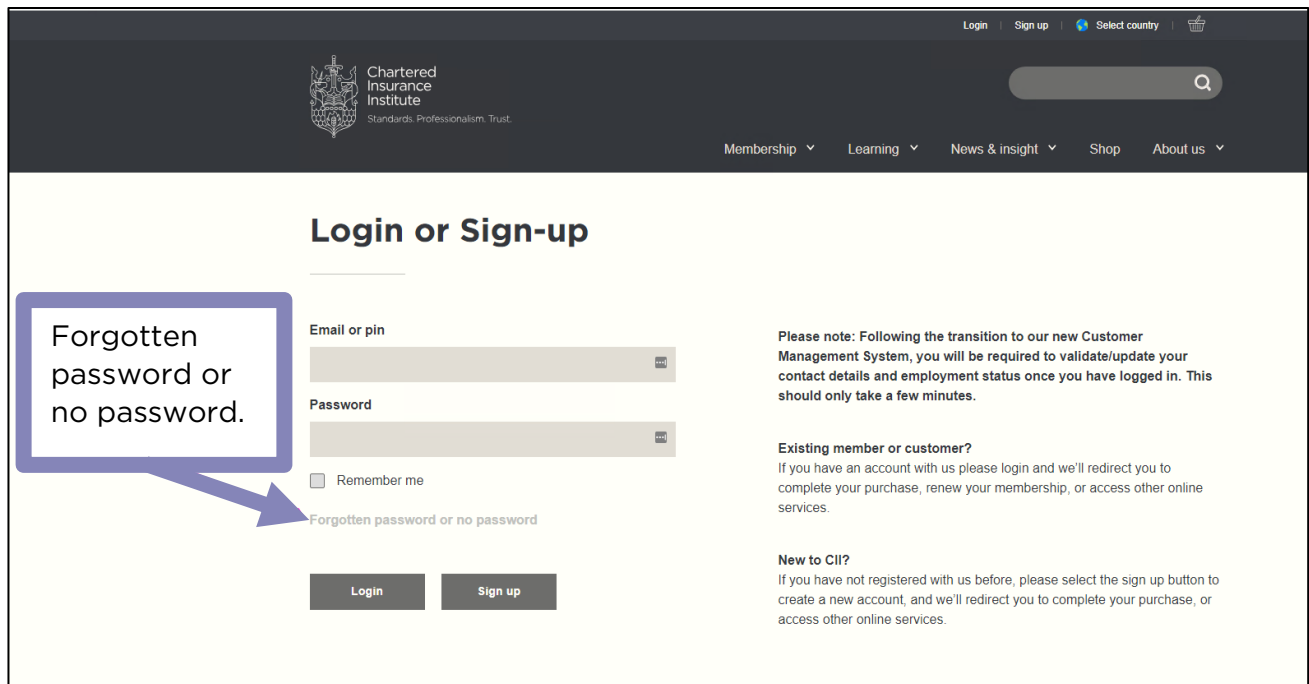
Please note: The process for resetting your password is the same for CII and PFS members. We will now show you the steps you should take to update your details on the CII website. The same steps can be followed on the PFS website.



3. Once the webpage has loaded, select 'Login' on the top right-hand sided



4. To create or reset your password you will need to select the 'Forgotten password or no password' link at the bottom of the Login screen.



5. You should now see the screen below. Please enter and confirm your email address and click 'Submit'. You will receive an email with a verification link. Click the link in the email and follow the steps to set up a password.

The screenshot shows the Chartered Insurance Institute website's password recovery page. The header includes the logo and navigation menu. The main heading is 'Forgotten your password?'. Below it, a message states: 'If you are a returning customer and you have forgotten your password, simply enter your registered email address below.' A sub-message says: 'We will send an email to this address with your PIN and a verification link back to our web site.' There are two input fields: 'Email address:' and 'Confirm email:'. A 'Submit' button is at the bottom.

6. Once you've set up a password, log in to the website using your PIN or email and password. You should be directed to the Member Dashboard.

The screenshot shows the Chartered Insurance Institute Member Dashboard for Mr Lee Child. The header includes the logo and navigation menu. The main heading is 'MyCII Dashboard'. A blue banner contains the following text: 'Our new system requires you to validate/update your contact details and employment status upon login. This should only take a few minutes. Please ensure you enter your city in your address. If your membership details are not displaying, please click 'Bookings and results,' then 'My Dashboard' to display your membership. IMPORTANT: If you would like to become a member, or renew a lapsed membership, please click 'Join.' Below the banner, there is a 'No new notifications' section. The dashboard is divided into three main sections: 'RevisionMate' (Once enrolled in a CII study course, you can access all your study support materials online via RevisionMate. Please select the button to access the site.), 'FutureMe' (CII Career development platform), and a 'My Membership' section (Member status).

## The Member Dashboard

The Member Dashboard provides quick access to a range of key features and member-exclusive benefits. Here are some of the things you can do from the Member Dashboard:

- Update your personal details including your email and address.
- Select your communication Preferences.
- Edit your membership details including your Local Institute and Community
- View your exam bookings and results.
- Access Perks - our affinity benefits scheme
- Log in to FutureMe - our member exclusive learning and development platform.

Please use the links on the left hand-side of your screen to navigate the member area.

# Getting in touch with us

If you have any questions or issues regarding this process or your membership, please contact us on the details below.

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