



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**

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

- | | | | | |
|--|--|--|--|--------------------------------|
| <input type="checkbox"/> Bank/Building Society | <input type="checkbox"/> Broker/Intermediary | <input type="checkbox"/> Consultancy | <input type="checkbox"/> Insurance company | <input type="checkbox"/> Legal |
| <input type="checkbox"/> Lloyd's | <input type="checkbox"/> Loss adjuster/Loss assessor | <input type="checkbox"/> Reinsurance company /Broker | <input type="checkbox"/> Other | |

Area of work

- | | | | | |
|---|---|--|---------------------------------------|----------------------------------|
| <input type="checkbox"/> Administration/ Processing | <input type="checkbox"/> Broking | <input type="checkbox"/> Claims/Loss adjusting | <input type="checkbox"/> Compliance | <input type="checkbox"/> Finance |
| <input type="checkbox"/> HR/Training | <input type="checkbox"/> Risk management /Surveying | <input type="checkbox"/> Sales/Marketing | <input type="checkbox"/> Underwriting | <input type="checkbox"/> 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 – Societies

Societies are dedicated professional bodies, focused around the issues that matter most in your area of insurance. As a Chartered Insurance Institute member, you can join one of our Societies for free.

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

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

Section D – 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 E - 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)	£37.00
<input type="checkbox"/> Subscription fee	
<input type="checkbox"/> Insurance Institute of London fee (if applicable)	£3.00
Total	

Section F - Payment details

Bank transfer via Bacs (using the CII account details below and including the required information).

CII account details:

HSBC Bank plc, 60 Queen Victoria Street, London EC4N 4TR
Account number: 50114723
Sort code: 40-11-60
BIC: HBUKGB4194R
IBAN: GB94HBUK40116050114723

Please include the following information so that we can identify your payment:

Date of submission Amount in sterling transferred £

Transaction reference number (if applicable) PIN

Important note: Transfers can take up to two weeks to process, therefore please ensure that you submit this in sufficient time to meet any relevant closing dates. You must include any bank charges in the transfer.

Making your payment:

- **By Bacs** - once your payment has been made, please email all pages of this completed application form, together with your remittance advice, to accounts.receivable@cii.co.uk

Direct Debit

If you do not currently pay by Direct Debit and have a UK bank account, you can spread the cost of membership by paying via monthly Direct Debit at no extra cost.



If the Insurance Institute of London is your local institute an additional fee of £3.00 a year is payable.

Instructions to your Bank or Building Society to pay by Direct Debit (Please complete all fields)

1. Name and full postal address of your Bank or Building Society branch

To: The Manager (Bank/Building Society)	Please only complete this Direct Debit instruction if you have a UK bank account. Post only to: CII Customer Service, 42-48 High Road, South Woodford, London E18 2JP Originator's identification no. 9 9 6 6 4 5
Address	
Postcode	

2. Name(s) of account holder(s)

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (PIN)

Please pay Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with the CII and if so, details will be passed electronically to my Bank/Building Society.

- I wish to pay my subscription by monthly Direct Debit payments
- I wish to pay my subscription by annual Direct Debit payments

Signature Date

Banks and Building Societies may decline to accept instructions to pay Direct Debits from some types of accounts.

The Direct Debit Guarantee:

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit the Chartered Insurance Institute will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request the Chartered Insurance Institute to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by the Chartered Insurance Institute or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when the Chartered Insurance Institute asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Section G - 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

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). **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

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 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

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

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

Subscription fees 2020

The following subscription fees are applicable from 01 January 2020 to 31 December 2020. 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	£6.66	£80.00	£58.00	£41.00
CII (Award)	£7.08	£85.00	£63.00	£47.00
Cert CII**	£10.83	£130.00	£89.00	£53.00
Dip CII***	£14.58	£175.00	£105.00	£66.00
ACII	£15.41	£185.00	£109.00	£78.00
FCII	£17.08	£205.00	£129.00	£102.00

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

Afghanistan, Angola, 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, Eswatini, Ethiopia, Gambia, Ghana, Guinea, Guinea-Bissau, Haiti, Honduras, India, Indonesia, Kenya, Kiribati, Korea (Dem. Peo. Republic of), 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, Sao Tome and Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, South Sudan, Sudan, Syrian Arab Republic, Tajikistan, Tanzania (United Rep. of), Timor Leste, Togo, Tunisia, Uganda, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza, Yemen, Zambia, Zimbabwe.

** 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

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

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

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

The Chartered Insurance Institute
CII Customer Service, 42-48 High Road, South Woodford,
London E18 2JP

Tel: **+44 (0)20 8989 8464**

 **Chartered Insurance Institute**
 **@CIIGroup**
cii.co.uk