

Reference: (CII use only)	

Continued membership scheme

Section A - Personal details

Important notes:

This scheme is suitable for members who have left the insurance or financial planning profession. See note 1 for further details.

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

(Please complete all fields. Your name should be entered as you wish it to appear on all CII official documents.) Date of birth Please give your CII/PFS permanent identity number if known (PIN) Mr/Mrs/Miss/ Ms/Other 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 Ext Mobile Tel Work address Country Postcode 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) Work

Section B - Scheme options

Please tick the option you are applying for:

If you are unsure how long you have been a member you can call Customer Service on +44 (0)20 8989 8464 (CII) or on +44 (0)20 8530 0852 (PFS), who will be able to help.

	I have been a member for less than 20 years from the date of this application - £40.00 a year

I have been a member for 20 years or more from the date of this application - £20.00 a year

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

Bank transfer via Bacs (using the CII account details below and	d 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 yo payment:	ur
Date of submission Amount in sterling	transferred £
Transaction reference number (if applicable)	PIN
Important note: Transfers can take up to two weeks to process, the relevant closing dates. You must include any bank charges in the transfer transfer to the relevant closing dates.	refore please ensure that you submit this in sufficient time to meet any ansfer.
Making your payment:	
By Bacs – once your payment has been made, please email all premittance advice, to revenue.team@cii.co.uk	ages of this completed application form, together with your
Direct Debit	
If you do not currently pay by Direct Debit and have a UK bank accepaying via monthly Direct Debit at no extra cost.	ount, you can spread the cost of membership by
If the Insurance Institute of London is your local institute an additio	nal fee of £3.00 a year is payable.
Instructions to your Bank or Building Society to pay by Direct Deb	it (Please complete all fields)
1. Name and full postal address of your Bank or Building Society bra	anch
To: The Manager (Bank/Building Society)	Please only complete this Direct Debit instruction if you have a UK bank account.
Address	Post only to: CII Customer Service, 3rd Floor, 20 Fenchurch Street, London EC3M 3BY
	Originator's identification no.
Postcode	9 9 6 6 4 5
2. Name(s) of account holder(s)	
Bank or Building Society account number A. Branch sort code	5. Reference number (PIN)
I wish to pay my subscription by monthly Direct Debit paymer	ate.
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:

Section C - Payment details

- 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 D - 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.

I have been a member of the CII/PFS for at least one year from the date of this application.

I have left the insurance or financial planning profession and would like to join the Continued Membership scheme.

In continuing my membership of the CII/PFS, 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

I acknowledge that as a member of the Continued Membership Scheme I retain the right to use any designation and or Chartered title previously awarded. I agree, however, that I will not use my designation or chartered title to indicate to the public or otherwise that I am a practising professional in the insurance or financial services industry.

Please tick the relevant box to confirm whether you have;

Been made bankrupt or been subject to an individual $\ \ \ \ $ Yes voluntary arrangement (or similar procedure) or any judgment debt.	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'.	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.	□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.

Signature	Da

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

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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

I am aware, that members of this scheme are not eligible to hold or to apply for a Statement of Professional Standing.

I have read all the notes and agree to abide by the rules of this scheme.

Date			

Notes

- 1. Continued Membership is open to all members (provided they have been a member for at least one year prior to the date of this application) who have left the insurance or financial planning profession. Members wishing to apply for the Continued Membership Scheme can submit an application at any time, from when their membership is due until their membership lapses. Members leaving the industry during a subscription period must pay the full subscription for that period and the rate for continued membership will change to start at the beginning of the next subscription period, unless membership is paid by monthly direct debit, in which case future payments will be adjusted accordingly.
 - Qualified members are reminded that if they allow their membership to lapse or decide to resign it, they would no longer be entitled to use any designatory letters or Chartered title.
- 2. Continuing Professional Development: Members on the Continued Membership Scheme are not required to comply with the CII CPD scheme. If you have an outstanding request from the CII for the submission of your CPD record, you must either submit this or provide evidence that you had left the industry for the period in question in order to be accepted onto the Continued Membership Scheme. For full details on the CII CPD scheme please visit cii.co.uk/cpd

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