

Application for Retired Membership Scheme

Please read the notes section and then complete all fields in BLOCK CAPITALS

Section A – Personal details

(Please complete all fields - it is essential we have your email address as this is our main channel of contact with you)

Please give your CII/PFS permanent identity number (PIN) if known PIN

Title Surname

Forenames Date of Birth

Daytime tel Mobile

e-mail

For every email address we receive, we will donate 10p towards Trees for Life reforestation programme in the Scottish Highlands. (see note 1)

Home Address

Postcode Country

Alternative Address

Postcode Country

Employer Name

Address to be used for correspondence Home Alternative

Section B – Membership Fees (see notes 2 and 3)

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

- Currently hold or have held membership for less than 20 years – **£40 a year.**
- Currently hold or have held membership for 20 years or more (continuously) – **£20 a year.**

If the Insurance Institute of London is your local institute you will pay an additional £3 a year

Section C – Methods of payment

Option 1 - Monthly payment by Direct Debit

- I wish to pay my subscription by monthly Direct Debit payments (See note 4)

If you do not currently pay by Direct Debit and you live in the UK, 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 you will continue to pay an additional £3 a year, which will be spread monthly.

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)

Address

Postcode

Please 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.

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

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (PIN)

Please pay CII 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.

Signature

Date

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

The Direct Debit Guarantee The Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society. If the amounts to be paid or the payment dates change The Chartered Insurance Institute will notify you 10 working days in advance of your account being debited or as otherwise agreed. If an error is made by The Chartered Insurance Institute or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid. You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to The Chartered Insurance Institute.

Option 2 - Annual methods of payment

Tick method of payment, and if applicable complete the card details.

If the Insurance Institute of London is your local institute you will continue to pay an additional £3 a year.

Tick method of payment, and if applicable complete the card details

Annual Direct Debit (please complete the Direct Debit mandate in Section C)

Cash/cheque payable to the Chartered Insurance Institute or The Personal Finance Society (please write your PIN on the back of the cheque)

Credit/debit card: Please debit my/our account with the total cost of the goods and services ordered on this form

Type of card (please tick) VISA MASTERCARD DELTA SWITCH/MAESTRO SOLO

Valid from* Expiry date* Issue number*

Card number*

*Please complete according to the information on the card.

Cardholder's name and address if different from overleaf

Cardholder's Signature

Date

Section D – Declaration

- I have retired from active business life in the insurance and financial services industry and would like to become a retired member and understand that I should not use my designation or chartered title to indicate to a member of the public or otherwise that I am a practising professional in the insurance and financial services industry. (see note 2)
- I will advise the Chartered Insurance Institute/The Personal Finance Society if I engage in paid employment within the insurance and financial services industry. I understand that I must pay the relevant annual subscription for the period of employment and comply with CPD requirements. (www.cpd.cii.co.uk)
- I have read all the notes and agree to abide by the rules of the scheme.
- Have you ever been made bankrupt or been the subject of an individual voluntary arrangement (or any such analogous procedure) or been convicted of, or charged with (but not yet tried with), any offence other than a monetary fixed penalty for a motoring offence? Yes No If yes please give details on a separate sheet of paper.

You are required to let the CII know if you are made bankrupt, become the subject of an individual voluntary arrangement (or any such analogous procedure) or are convicted of any offence (other than a motoring offence with a monetary fixed penalty) in the future.

Signature

Date

Notes to the application form

1. Help us make a difference by providing us with your email address:

Given the increased focus on environmental issues and climate change, we are trying to reduce the number of paper mailings we send to our members. Please help us to do this by providing us with your email address, if you have one. For every email address we receive, we will donate 10p towards Trees for Life's reforestation programme in the Scottish Highlands.

To provide or update your email address, please log onto www.cii.co.uk/amend or www.thepfs.org/amend or telephone CII on +44 (0)20 8989 8464 or PFS on +44 (0)20 8530 0852.



If a retired member allows their membership to lapse or resigns, it may be reinstated on completion of a new retired membership application form. Payment of the standard re-admission fee in addition to the appropriate subscription for the period in which reinstatement takes place will be applied.

Retired members who hold qualified status 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.

You may be subject to disciplinary investigations by the CII if you fail to comply with any of the declarations as stated.

- ### 2. Retired Membership
- is open to all past and present members, (with the exception of those non qualified members who have not been a member for at least a three year period) who **have fully** retired from active business in the insurance and financial services industry. Members wishing to apply for retired status should do so as soon as possible so that records can be amended before the commencement of the next subscription period. Applications will be accepted for a discretionary 3 months after a subscription is due, after which it will be necessary for the full subscription to be paid and applications will be processed to begin at the start of the next subscription period. Retired status cannot be backdated to previous subscription periods. Members retiring during a subscription period must pay the full subscription for that period and the rate for retired membership will change to start at the beginning of the next subscription period.

- ### 3. Fees:
- Subscription fees are revised annually. Members with less than 20 years membership; £40. Members with 20 years or more continuous membership; £20. Continuous membership also accrues within the continued membership scheme.

- ### 4. Direct Debit:
- You can elect to pay your annual membership fee by Direct Debit using the instruction overleaf. We may retain the instruction and, if we do so, details will be passed to your bank electronically. Any changes in the membership rate will be subject to all the usual safeguards laid down in the Charter & Bye-Laws.

It is recommended that all members who have a UK current account should pay their membership by monthly Direct Debit.

The Chartered Insurance Institute

CII Customer Service, 42-48 High Road, South Woodford, London E18 2JP. Telephone CII on +44 (0) 208 989 8464 or PFS on +44 (0) 208 530 0852 Fax +44 (0) 208 530 3052 Email: customer.serv@cii.co.uk or customer.serv@thepfs.org Web: www.cii.co.uk or www.thepfs.org

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