

Reference:
(CII use only)



Application for Membership support scheme

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

Mr/Mrs/Miss/Ms Surname

Forenames Date of birth

Daytime tel Mobile

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

Employer name

Job title

Work address

Postcode Country

Home address

Postcode Country

Address to be used for correspondence Home Work

Section B – Scheme options

Please tick one of the options below which describes your reason for applying for support, evidence is required to support your application (see note 3).

Part-time Career break Maternity leave Unemployment/Redundancy Long Term Ill Health Special Circumstances

There are two options available; please tick the option you are applying for (see note 4).

Option 1 Option 2

Section C – Fees and method of payment

Option 1 - Monthly payment by Direct Debit

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.

You will pay half the annual subscription (option 1 only)

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.

9 9 6 6 4 5

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

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (CII PIN)

Notes

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.

2. **Membership Support Scheme** is open to all members, although non qualified members must have been a member for at least 3 years. Members wishing to apply for the membership support scheme can submit an application up to 3 months before their subscription is due. There will be a further 3 months discretionary period for submission after receipt of the latest subscription renewal. After which it will be necessary to pay the full subscription and applications will be processed to start at the beginning of the next subscription period, on the receipt of a new application form. Support cannot be backdated to previous subscription periods. Members affected during a subscription period must pay the full subscription for that period and the supported members' rate will start at the beginning of the next subscription period.

If a member allows their membership to lapse outside of this scheme, it can be reinstated and a standard re-admission fee in addition to the appropriate subscription for the period in which reinstatement takes place will be payable.

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.

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

3. **Part-time scheme:** Open to members that are working part-time for 18 hours or less a week in the insurance and financial services industry. Evidence required: a letter from your employer confirming your hours, on company letterhead. Qualified members working part-time are still required to undertake CPD, as this forms an important part of our Code of Ethics and Conduct.

Career break: Open to members that are in full-time care of a dependant or undertaking full-time studies to further an individual's career in the insurance and financial service industry. Career breaks cannot be considered for overseas travel (i.e. backpacking), full or part-studies NOT related to an individuals career in the insurance and financial services industry. Evidence required: a copy of your study enrolment and/or confirmation from your employer, on company letterhead.

Maternity leave: Open to members that are on maternity leave. Evidence required: a confirmation from your employer, on company letterhead.

Unemployment/Redundancy: Open to members that are registered unemployed and who are actively seeking employment. Evidence required: a redundancy notice within 3 months or reasons for unemployment, a job seekers certificate or confirmation from the employment office.

Ill Health: Open to members that are hospitalised or unable to return to work for a period of 6 months or more. Evidence required: an up-to-date medical certificate or doctor's letter, indicating as far as possible how long the member will be away from work. In cases of terminal illness all future subscriptions may be waived at the discretion of the management.

Special Circumstances: Open to members that are having difficulty in maintaining membership subscriptions due to financial hardship or other special circumstances they think should be considered. Evidence required: all relevant details plus supporting evidence of any DWP benefits received.

4. **Option 1** – Members applying for this option will pay half the annual subscription. Members are required to send in an application form for each year they wish the scheme to apply. Year 1 and 2 will be granted on receipt of the application form. Should members wish to extend this option for a further year, they should complete and submit another application form which will be granted on a discretionary basis. Qualified members applying for this option will retain the right to continue using their designatory letters and Chartered status and will maintain full membership benefits.

Option 2 – Members can apply for voluntary short term resignation (the scheme cannot be backdated and no refund will be given). The resignation will commence from the next renewal date. Members that choose this option will be able to apply for re-admission to membership within 2 years of resignation; and the re-admission fee will be waived. For qualified members, there will be no CPD requirement, although members that hold designatory letters or Chartered Titles would no longer be entitled to use them until such time as they reinstate their membership.

5. **Fees:** Subscription fees are revised annually. If you wish to apply for the assistance scheme for a further year, send in an application form up to 3 months before your subscription is due.

6. **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.

When returning your application form, please check that you have:

1. completed all sections of the form
2. enclosed the relevant supporting evidence (see note 3)
3. enclosed payment and/or completed the credit/debit card/Direct Debit mandate (if applicable)

Please complete the application form and return to the address overleaf.

