Application for Retired Membership Scheme

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

Section A – Personal details **It is important 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

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

Have you ever been convicted of, or charged with (but not yet tried), any offence other than motoring? Yes ☐ No ☐ (please tick)

If yes please give details on a separate sheet of paper. You are required to let the CII/PFS know if you are convicted of any offence (other than motoring) in the future

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 +44 (0)20 8989 8464, 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

☐ **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)

DIRECT Debit

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 (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/The Personal Finance Society 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

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

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

☐ **Cash/cheque payable to the Chartered Insurance Institute/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 your credit/debit card.

Cardholder's name and address if different from address in Section A

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
- I undertake to advise the Chartered Insurance Institute/The Personal Finance Society if I engage in paid employment within the industry. I understand that I must pay the relevant annual subscription for the period of employment
- I have read all the notes and agree to abide by the rules of the scheme

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 telephone **+44 (0)20 8989 8464.**

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 life 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. However, applicants 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 members will change to start at the beginning of the next subscription period.

   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 Status.

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 retired 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.

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

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

Tel: + 44 (0)20 8989 8464 Email: customer.serv@cii.co.uk Web: www.cii.co.uk