

Reference:  
(CII use only)

This scheme is suitable for members who have fully retired from active business life in the insurance or financial services industry. See note 1 for further details.



# Retired membership scheme application form

## 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 (PIN) if known PIN

Mr/Mrs/Miss/  Surname/   
Ms/Other  Family name   
Forename/   
Given name(s)

Gender ☐ Male ☐ Female (Please tick) Date of birth

Tel  Ext  Mobile

Home address

Postcode  Country

email

Please take care when providing your email address as most correspondence will be sent electronically.

Tick address to be used for postal correspondence ☐ Home ☐ Work

## Section B – Scheme options

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

☐ I have been a member for less than 20 years from the date of this application – **£40 a year.**

☐ I have been a member for 20 years or more from the date of this application – **£20 a year.**

*If the Insurance Institute of London is your local institute an additional fee of £3 a year is payable*

## Section C – Payment details

☐ **Cash/cheque payable to the Chartered Insurance Institute** (please write your PIN on the back of the cheque)

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

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

Valid from\*  Expiry date\*  Issue number\*  (Maestro/Solo only)

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

Please fax the completed form if paying by credit/debit card on +44 (0)20 8530 3052 or send with your cheque to CII, Customer Service, 42–48 High Road, South Woodford, London E18 2JP. In the interests of data security we do not recommend you send credit or debit card details by email.

### Direct debit



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

To: The Manager	(Bank/Building Society)
Address	
Postcode	

Originator's identification no.

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[illegible]

#### 4. Branch sort code

5. Reference number (CII PIN)

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☐ I wish to pay my subscription by monthly Direct Debit payments

☐ I wish to pay my subscription by annual Direct Debit payments

Signature

\_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_

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 CII will notify you 10 working days in advance of your account being debited or as otherwise agreed. If an error is made by the CII 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 CII.

## Section D – Declarations

I have fully retired from active business life in the insurance or financial services industry and would like to become a retired member of the CII/PFS.

In continuing my membership of the CII/PFS, I agree to be 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 [www.cii.co.uk/memberobligations](http://www.cii.co.uk/memberobligations)

I acknowledge that as a member of the Retired 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 voluntary arrangement (or similar procedure) or any judgement debt. ☐ Yes ☐ No

– Been convicted for (or been charged but not yet tried with) any 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 as a member of the CII/PFS, 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 on the CII's website). To process this application, I am deemed to have consented to the CII/PFS processing my data.

## Privacy and electronic communications regulations

The CII may from time to time wish to draw your attention to other CII products and services electronically which are likely to be of interest to you. The CII will assume your consent to us using your data in this way, unless you tick the following box. ☐

## Sharing your data with local institutes

The CII will share your data with your local institute (UK, Channel Islands and Isle of Man based members only) so they may communicate to you any local events, products and services that complement those offered by the CII. The CII will assume that you consent to us using your data in this way, unless you tick the following box. ☐

### 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](mailto: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.

Signature

\_\_\_\_\_

Date \_\_\_\_\_

\_\_\_\_\_

## Notes

**1. Retired 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 fully** retired from active business in the insurance or financial services industry. Members wishing to apply for the retired membership scheme can submit an application at any time, from when their membership is due until their membership lapses. 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 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:** Retired members 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 were in fact retired during the period in question in order to be accepted onto the Retired Membership Scheme. For full details on the CII CPD scheme please visit [www.cii.co.uk/cpd](http://www.cii.co.uk/cpd)