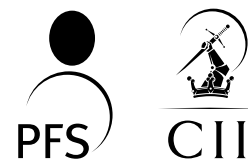


Reference:
(CII use only)



Application for Retired Membership 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

Home address

Postcode Country

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 Membership Services on +44 (0)20 8530 0900 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 – Fees and method of payment

Option 1 – 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

☐ 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 goods and 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

Section C – (continued)

Option 2 – 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. 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.

996645

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

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (CII PIN)

☐ I wish to pay my subscription by monthly 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: 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 – Declaration

I am or have been a member of the Chartered Insurance Institute/Personal Finance Society.

Unqualified members only: I have been a member of the Chartered Insurance Institute/ Personal Finance Society during the last three years from the date of this application.

I have fully retired from active business life in the insurance and financial services industry and would like to become a retired member of the Chartered Insurance Institute/The Personal Finance Society and understand that I should not use my designation or chartered title to indicate to the public or otherwise that I am a practising professional in the insurance and financial services industry

Having been accepted as a member of the Chartered Insurance Institute (CII), I agree, to abide by: CII’s Charter and Byelaws; CII’s Code of Ethics; all CII’s rules and regulations; the constitution and byelaws of any local institute of which I become a member.

Additionally where I am a member of the Personal Finance Society (PFS), I agree to abide by the PFS Articles of Association and Bye-Laws including the commitment to pay £1 in the event of the Society being wound up and there being a shortfall in assets. PFS members automatically become a member of the CII.

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

Please tick the relevant box to confirm whether you have:

- Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure). ☐ 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/PFS is registered under the Data Protection Act 1998 and will ensure that in providing products and services to you it (and its business associates) will process your personal data fairly. By submitting this application, I consent to the CII/PFS processing my data. Full details are included in the CII/PFS Data Protection and Privacy statement which is available on the CII’s website.

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

Sharing your data with third parties: CII/PFS will never sell your data to third parties for commercial gain. We may however share your data with third parties who provide 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 Protection (Distance Selling) Regulations 2000 you have a right of cancellation in respect of these products and services. This right shall (subject to the Regulations) expire seven working days from the day after the date on which either the products are received by you or your order for services is accepted by the CII. Should you wish to cancel, notice should be sent to Customer Service. Where products have been supplied to you prior to cancellation they must be returned to us, in the condition in which they were supplied at your expense. Reimbursement for any monies paid by you for the product or service will be made within 30 days of receiving notice of cancellation or, if products are returned to us within 30 days of their receipt.

You must answer the questions on this form truthfully, including the declarations you make. Any information you provide which is misleading or untrue may result in your membership being cancelled. It may also lead to disciplinary or criminal proceedings. If there are any questions or any parts of the declaration which you do not understand then you can refer to the CII website www.cii.co.uk/explanatorynotes although the CII do not accept any liability for information or clarification given.

Signature

Date

Notes

- 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.
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.
- Retired members are not required to comply with the CII/PFS’s Continuing Professional Development Scheme.
- 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.
 - Direct Debit:** You can elect to pay your annual membership fee by Direct Debit using the instruction above. 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.

