Reference:	
(CII use only)	

Important notes:

include any bank charges in the transfer.

This scheme is suitable for members who have left the insurance or financial services industry. See note 1 for further details.

Please complete all sections of this form in BLOCK CAPITALS and return to: CII Customer Service, 42–48 High Road, South Woodford, London E18 2JP

If you require any assistance or advice when completing this form please call

Customer Service on +44 (0)20 8989 8464 or email customer.serv@cii.co.uk

PFS | CII

Continued membership scheme application form

Section A – Po	aren	nal	de	ata	ile																																	
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Section C – Pa	ovm	ont	de	ata	ile																																	
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Bank transfer via																									,,,,,,,									0	••••			
CII account details: HSBC Bank plc, City Account number: 22 Sort code: 40-05-30 Swift code: MIDLGB: IBAN: GB21MIDL400	27104 22	44			ı , 60) Qı	uee	en V	ict.	oria	ı St	treet	t, Lo	ondo	on	EC.	4N	4TR																				
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Important note: Transfers can take up to two weeks to process, therefore please ensure that you submit this in sufficient time to meet any relevant closing dates. You must

Section C - Payment details continued

Making your payment:

- **By Bacs** once your payment has been made please email all pages of this completed application form, together with your remittance advice, to accounts.receivable@cii.co.uk or fax it to +44 (0)20 8530 3052.
- By cheque/bankers draft post this completed application form, along with your cheque/bankers draft to CII Customer Service, 42–48 High Road, South Woodford, London E18 2JP.

Direct Debit

If you do not currently pay by Direct Debit and have a UK bank account, you can spread the cost of membership by paying via monthly Direct Debit at no extra cost.



☐ Yes ☐ No

If the Insurance Institute of London is your local institute an additional fee of £3 a year is payable, which will be spread monthly.

Instructions to your Bank or	Building Society to pay	by Direct Debit	(Please	complete a	all fields)
•	• , , ,	•	*		,

1. Name and full postal address of your Bank or Building Society bra	anch
To: The Manager (Bank/Building Society)	Please complete this Direct Debit instruction if you have a UK Bank account.
Address	Post only to: CII, Customer Service, 42–48 High Road, South Woodford, London E18 2JP
	Originator's identification no.
Postcode	9 9 6 6 4 5
2. Name(s) of account holder(s)	
3. Bank or Building Society account number 4. Branch sort co	de 5. Reference number (CII PIN)
I wish to pay my subscription by monthly Direct Debit payment	ts
I wish to pay my subscription by annual 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

- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits.
- If there are any changes to the amount, date or frequency of your Direct Debit the Chartered Insurance Institute will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request the Chartered Insurance Institute to collect a payment, confirmation of the amount and date will be given to you at the time of the request.
- If an error is made in the payment of your Direct Debit, by the Chartered Insurance Institute or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society.
- If you receive a refund you are not entitled to, you must pay it back when the Chartered Insurance Institute asks you to.
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.

Yes No

Section D – Declarations

I have been a member of the CII/PFS for at least one year from the date of this application.

I have left the insurance or financial services industry and would like to join the Continued Membership scheme.

In continuing my membership of the CII/PFS, I agree to be immediately 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

I acknowledge that as a member of the Continued 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.

motoring offence. Please note, if the conviction is considered spent under the Rehabilitation of Offenders Act you should select '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	☐ Yes	□No

Been convicted for (or been charged but not yet tried with)

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

authority.

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.

Section D – Declarations continued

Sharing information with your employer

The CII will, upon request from your employer, provide it with details of your assessment record and accreditation including all attempts and future entries, along with your CII/PFS permanent identity number. If you ${\bf DO}$ ${\bf NOT}$ wish for us to provide these details to your employer, please tick the following box. \square

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. If you **DO NOT** consent to the CII using your data in this way, please tick the following box. \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, electronically, any local events, products and services that complement those offered by the CII. If you **DO NOT** consent to the CII using your data in this way, please tick the following box. \square

To opt out of postal marketing communications from the CII and your local institute please send a request to Customer Service at **customer.serv@cii.co.uk**

Signature

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.

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.

Date			

Notes

1. Continued Membership Scheme 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 left the insurance or financial services industry. Members wishing to apply for the Continued Membership Scheme can submit an application at any time, from when their membership is due until their membership lapses. Members leaving the industry during a subscription period must pay the full subscription for that period and the rate for continued 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: Members on the Continued Membership Scheme 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 had left the industry for the period in question in order to be accepted onto the Continued Membership Scheme. For full details on the CII CPD scheme please visit www.cii.co.uk/cpd