



Enrolment for the Fellowship Programme

Important notes:

Please complete all sections of this form in BLOCK CAPITALS. If you require any assistance or advice when completing this form please contact Customer Service or email societies.fas@cii.co.uk

Once completed, please email the form to: societies.fas@cii.co.uk

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 if known (PIN) Date of birth

Mr/Mrs/Miss/ Ms/Other Surname/ Family name

Forename/ Given name(s)

Preferred name

(Please enter the name you would like to be addressed by for all correspondence)

Gender (Please tick) Male Female Prefer not to say Other

Employer's name

Tel Ext Mobile

Work address

Postcode Country

Home address

Postcode Country

Mandatory - please take care to enter this correctly as we will be unable to process your application without a valid email address.

Primary email

Alternative email

Address to be used for postal correspondence (Please tick) Home Work

Section B – Fees and method of payment

Enrolment fee and BEP	£310.00	£
Re-enrolment fee only*	£215.00	£

*Only select this option if you have previously successfully completed the BEP.

Tick here if you have already completed the BEP and are only paying the re-enrolment fee.

To comply with the latest Payment Card Industry Data Security Standards (PCI DSS), the CII no longer accepts credit and debit card as a payment method for paper applications.

If you would like to receive a payment receipt, please tick the below box.

Email

(If selecting email be sure to provide your email address on the first page of the form)

Make sure you have signed and dated the declarations, and ticked a payment method.

The preferred method of payment is a bank transfer via Bacs. Please use the CII account details below and include the required information.

CII account details:

HSBC Bank plc, 60 Queen Victoria Street, London EC4N 4TR

Account number: 50114723

Sort code: 40-11-60

BIC: HBUKGB4194R

IBAN: GB94HBUK40116050114723

Please include the following information so that we can identify your payment:

Date of submission Amount in sterling transferred £

Transaction reference number (if applicable) PIN

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 include any bank charges in the transfer.

How to place your order:

- **Payment by Bacs** – once your payment has been made please email all pages of this completed application form, together with your remittance advice, to societies.fas@cii.co.uk

Section C – Declarations

I declare that all information provided by me on this form is true and correct to the best of my knowledge.

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 at cii.co.uk/dataprotection). **To process this application, I consent to the CII processing my data.**

Use the CII website to update your contact details and preferences, selecting the types of information and services you wish to receive and to opt in or out of mailings: cii.co.uk/mycii

Please note: if you choose not to receive marketing emails, you will still receive transactional communications relating to your membership, qualifications, event bookings and voting rights, as well as important operational notifications relating to the CII. Where applicable, you can choose to receive these by post by logging in to cii.co.uk/mycii and updating your preferences.

Privacy and electronic communications regulations

In order to keep you informed in a timely and cost-effective manner, the CII uses email as our principal method of communication. From time to time, we may wish to electronically draw your attention to other CII products and services which are likely to be of interest to you. **I consent to receiving marketing communications from the CII by email.** Yes No

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

Sharing your data with local institutes

CII local institutes provide access to a programme of services including CPD events, training and networking opportunities designed to support you and complement your CII membership. We will share your data with your local institute (UK, Channel Islands and Isle of Man based members only) so they may send you relevant email communications. **I consent to the CII sharing my data with my local institute.** Yes No

Sharing information with your employer

The CII may receive a request from your employer to provide it with details of your assessment record and accreditation including all attempts and future entries, along with your CII permanent identity number. **I consent to the CII sharing this information with my employer.** Yes No

Application for study materials

I undertake to use them for my own purposes and not to sell, copy, lend or give them to anyone else.

Plagiarism

In submitting work under the Fellowship programme you are declaring that you have read the Fellowship guidelines and that it is your own work. Failure to comply with these rules may result in disciplinary action and your name being published in our Journal and Personal Finance Professional magazines and on our website.

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

Signature

Date

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Section D – Fellowship plan

Please refer to the Fellowship regulations and guidelines when completing your plan. Please complete this form and keep a copy for your reference.

Objectives set to reach Fellowship:

	Target	Actual
Date enrolled on Fellowship scheme	<input type="text"/>	<input type="text"/>
Intended date of submission of BEP for assessment	<input type="text"/>	<input type="text"/>
Intended date of completion of major achievement	<input type="text"/>	<input type="text"/>
Intended date of completion of Statement of Personal Development	<input type="text"/>	<input type="text"/>
Intended date of application for election to Fellowship	<input type="text"/>	<input type="text"/>

State how you have tried to ensure that your personal objectives in reaching Fellowship also meet with those of your employer:

Section E – Major achievement chosen to support election to Fellowship

Please indicate which of the following options you intend to put forward as your major achievement.

Dissertation* Project* Published work* Qualification†

† If you intend to submit an alternative qualification as your major achievement, please attach a completed copy of the major achievement application form and supporting documentation with this plan. This application form can be found on the CII website cii.co.uk/fellowship.

* If you intend to submit a dissertation, project or portfolio of published work as your major achievement, please complete the following:

Title	<input type="text"/>
Brief description of content	<input type="text"/>

Please note:

- That if your submission contains any company-specific information you should obtain an endorsement of your intended major achievement from your employer.
- In submitting your major achievement you are agreeing, where this is successfully accepted towards Fellowship, for the CII to make this available for public view.

Signature

Date