



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Reference: (CII use only)

Membership for company arrangements

Important notes:

Please complete all section of this form
in **BLOCK CAPITALS**

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

Section A – Personal details

(Please complete **ALL** fields. Please enter the details used on your official documents (eg. passport.)

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)

Gender (Please tick) Male Female Prefer not to say

Tel

Mobile

Mandatory - please note that you must provide at least one contact number.

Address

Country

Primary email

Secondary email

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

Section B – Work details

Employer name

Tel

Address

Country

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

Please tick ONE box per category

Type of organisation

- Bank/Building Society Broker/Intermediary Consultancy Insurance company Legal
 Lloyds Loss adjuster/
Loss assessor Reinsurance company/
Broker Other

Area of work

- Administration/
Processing Broking Claims/Loss adjusting Compliance Finance
 HR/Training Risk management/
Surveying Sales/Marketing Underwriting Other

Job category

- Board member
(CEO, Director) Business owner Middle management
(Branch, Office, Dept) Senior management
(General, Head of) Supervisor/Controller
 Technician/Co-ordinator Trainee Other

Area(s) of specialism

(Commercial)

- Accident and health Aviation Construction Engineering Liability
 Marine Motor Property Travel Other

(Personal)

- Accident and health Home Motor Pecuniary loss Travel
 Other

Career stage

Please select the statement that best describes your current situation:

Section C – Declarations

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and financial planning professions. Suitability for membership is assessed based on completion of the below declarations. This is part of our commitment to high professional standards.

In applying to become a member of the CII, 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 cii.co.uk/memberobligations

Please tick the relevant box to confirm whether you have;

1. Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure) or any judgement debt.
 Yes No
Been subject to an adverse judgment of any court (or been charged but not yet tried with) any criminal 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
2. 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 whilst a member of the CII, 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 at ciigroup.org/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: ciigroup.org/my-dashboard

Sharing information with your employer

The CII will share details of your assessment record and accreditations including all attempts and future entries, along with your CII PIN with your employer.

I consent to the CII sharing my data.

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 (e.g. new qualifications or units) which are likely to be of interest to you.

I consent to receiving marketing communications from the CII by email. Yes No

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.

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

Membership card

Your digital membership card will be available to download from your members area once your payment has been received.

Continuing Professional Development


Continuing Professional Development (CPD) is activity undertaken to ensure members' skills and knowledge are up-to-date. All qualified members (those entitled to use CII designations and Chartered titles) are required to comply with our CPD scheme as a condition of their membership. Information on the CII's CPD scheme can be found at [ciigroup.org/learning/cpd/](https://www.ciigroup.org/learning/cpd/)

Code of Ethics

All CII members are required to uphold clearly defined and objectively measured standards of behaviour. These standards are contained within the CII Code of Ethics which all members are required to uphold as a condition of membership. This can be found at [ciigroup.org/code](https://www.ciigroup.org/code)

The Chartered Insurance Institute

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 @CIIGroup

www.ciigroup.org