Order securely online

Orders can be placed securely online by visiting **www.cii.co.uk/qualifications** and selecting your qualification then unit.

Alternatively, call Customer Service to pay using a credit or debit card, or complete this Bacs or cheque payment application form, which can be posted, or in the case of Bacs, faxed or emailed to Customer Service.

Please ensure you have read the important entry information on pages 20–21.

Bacs and cheque payment application form

ICI005 (10/16)

Important note: To ensure that your application is processed correctly can you please enter your name at the top of each page in the space provided.

Section A – Personal details (Please complete all fields. Your name should be entered as you wish it to appear on your certificate.)

Have you ever had previous contact with the CII? (Please tick) ☐ Yes ☐ No

Please give your CII/PFS permanent identity number (PIN) if known PIN

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

Forename/Given name(s)

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

Employer's name

Tel | Ext | Mobile

Work address

Postcode | Country

Home address

Postcode | Country

email

Please take care when providing your email address as most correspondence will be sent electronically. Email address must be included when ordering ebooks Learn, audio revision, question packs and coursework assessment.

Tick 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

☐ Lloyd's ☐ 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) ☐ Supervisory/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

Study path

Where you are studying in order to complete a qualification please indicate by ticking the appropriate box:

☐ Award for the Foundation Insurance Test ☐ Award in London Market Insurance ☐ Certificate in Insurance ☐ Diploma in Insurance ☐ Advanced Diploma in Insurance

Please turn over

Enter your name

Section B – Associated or affiliated institute membership

If you are a member of an institute affiliated or associated with the CII (see **page 21**) you are able to enter CII exams and purchase study materials at the same price as those charged to members of the CII. If you wish to benefit from these discounts, please confirm details of your institute membership below for validation.

Name of institute

Current membership no

Important notes:

1. These discounts are only available to current associated or affiliated members and false applications may result in exclusion from future CII exams.
2. You must provide these details with each application. Failure to do so, will result in you being charged non-member rates.

Section C – CII membership

Please **ONLY** complete this section if you are applying for membership. Go to Section D if you are already a member.

I wish to apply for membership of the CII ☐ Yes ☐ No

Your CII membership level will be allocated based on your qualification history with the CII. Please tick the relevant box below:

☐ **Ordinary** – I do not currently hold a CII insurance qualification.

☐ **CII (Award)** – I hold the Award in General Insurance.

☐ **Cert CII** – I hold the Certificate in Insurance.

☐ **Cert CII (Claims)** – I hold the Certificate in Insurance including one of: (IF4) Insurance claims handling process, (M85) Claims practice or (820) Advanced claims. I also wish to join the Claims Faculty.

☐ **Cert CII (Customer Service)** – I hold the Certificate in Insurance, including the unit (IF9) Customer service in insurance.

☐ **Cert CII (Health and Protection)** – I hold the Certificate in Insurance, including the compulsory unit IF1 and two of the specified health and protection units. I am also employed in the health and protection market.

☐ **Cert CII (Insurance Broking)** – I hold the Certificate in Insurance, including one of units (I10) Insurance broking fundamentals, (P81/M81) Insurance broking practice or (930) Advanced insurance broking.

☐ **Cert CII (London Market)** – I hold the Certificate in Insurance, including the Award in London Market Insurance (or LLMIT prior to 01 July 2010).

☐ **Dip CII** – I hold the Diploma in Insurance or equivalent.

☐ **Dip CII (Claims)** – I hold the Diploma in Insurance, including one of: (M85) Claims practice, or (820) Advanced claims.

I wish to join the following local institute – UK only (See **page 21**)

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 **www.cii.co.uk/memberobligations**

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 have you 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, 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.

Faculties

Please choose below which faculty you would like to join. These provide access to market-relevant CPD and career support. You should select the faculty that will best support your personal career development needs. More information can be found at **www.cii.co.uk/faculties**

You can **join one faculty for free**. If you wish to join additional faculties please contact CII Customer Service on +44 (0)20 8989 8464.
(select one)

☐ Insurance Broking Faculty ☐ Claims Faculty ☐ Underwriting Faculty ☐ Life & Pensions Faculty ☐ Learning & Development Faculty

Enter your name

Section C – CII membership continued

Membership fees

1. An admission fee of £37 is payable by **ALL** applicants except those buying a blended learning package at the point of joining.

2(a). Please then select the appropriate member fee.

CII membership level	UK subscription (Monthly fee)	UK subscription (Annual fee)	Non-UK subscription (Annual fee)	Low GDP† subscription (Annual fee)
Ordinary member	**£6.24**	**£74**	**£54**	**£38**
Cert CII*	**£10.00**	**£120**	**£82**	**£49**
Dip CII **	**£13.37**	**£160**	**£97**	**£61**
ACII	**£14.24**	**£170**	**£99**	**£71**

* Same fee applies to Cert CII (Claims)/(Customer Service)/(Health and Protection)/(Insurance Broking)/(London Market)

** Same fee applies to Dip CII (Claims)

† A discounted membership fee is available for individuals resident in low GDP countries. See **page 18** for details.

Important note: An additional £3 subscription fee is payable for membership of the Insurance Institute of London.

2(b). Choose the method of payment. This can either be:

i) by monthly Direct Debit. **If you choose this option do not complete the sub total box, but fill out the Direct Debit form at the back of this application form. The admission fee will be spread across your 12 monthly payments**

ii) by Bacs or cheque. **If you choose this option please enter the correct amount in the sub total box, including the admission fee.**

(to include the £37 admission fee)

Sub total £

Section D – Study options and revision aids

For details on unit enrolment periods please refer to the Exam assessed units information, which can be found within the Study options guidance on **page 13**.

To order your study text as an ebook put a tick in the box under the 'e' icon. If left unticked, you will receive a printed book. Please check www.cii.co.uk/ebooks for details and availability before ordering.

I wish to order the following learning materials:

Study packages (exam entry included)	CII use	Member	Non-member	Unit codes and ebook requirement: code	e	code	e	code	e	Total
Certificate in Insurance blended learning programme (units IF1–IF8) (See **pg 12**)	LP	£259 (membership payable separately)	£327		☐		☐		☐	£
• FIT	UD	£122	£152		☐					£
• LM1, LM2		£228	£299		☐		☐			£
• 590		£271	£342		☐					£

Non-EU candidates: where applicable, an excl.VAT price is listed on **page 12**. When ordering outside the EU, include the excl. VAT price below.

Sub total £

Study options	CII use	Member	Non-member	Unit codes and ebook requirement: code	e	code	e	code	e	Total
Coursework assessment • 530, 820, 930, 945, 960, 990, 992	UD	£443	£530		☐		☐		☐	£
• 993		£1,109	£1,384							£
Dissertation assessment 991,994		£1,109	£1,384							£
Mixed assessment • M05, M21, M80, M81, M85, M92 , M93, M94, M96, M97, M66, M67,M86 (Available Apr 2017), M90, M91, M98		£408	£496		☐		☐		☐	
Study text with updates • Diploma units (except M05, M66, M67, M80, M81, M85, M86, M90, M91, M92, M98, 991, 992 and 993)		£144	£168		☐		☐		☐	£
• IF1–IF9, I10, I11		£122	£152		☐		☐		☐	£
Study text renewal • Diploma/Advanced Diploma units (except 991, 992 and 993)		£72	£84		☐		☐		☐	£
• Certificate units (except LM1 and LM2)		£61	£76		☐		☐		☐	£
• FIT		£31	£38		☐					£
• LM1, LM2		£61	£76		☐		☐			£

Sub total £

Enter your name

Section D – Study options and revision aids continued

Revision aids	CII use	Member	Non-member	Unit code	Total
Exam guides	Available to buy online at **www.cii.co.uk/qualifications** or to download for free from **www.revisionmate.com** if you have a live study option enrolment.				
Key fact booklets – Printed format (See **pg 14**)	KF	£26	£31		£
Key fact booklets – ebook format (See **pg 14**)	KF	£26	£31		£
Question packs (See **pg 14**)	QP	£26	£31		£
Learn (See **pg 14**)	EL	£44	£48		£
Revision days (See **pg 15**) • FIT, IF1–IF4, IF7, IF9, LM1	R	£230	£270		£
• P21, P66, P67, P80, P86, P90, P91, P93, P94, P96, P97, P98	R	£265	£310		£
• 590	R	£295	£350		£
	Date			Venue	
Revision workshops (See **pg 15**) • LM2	WS	£395	£470		£
• 590	WS	£450	£550		£
	Date			Venue	£
Half day revision days (mixed assessment Diploma units)	HD	£150	£170		£
	Date				

Key fact booklets are now available in ebook format. Visit www.cii.co.uk/ebooks for more information.

Sub total £

Postage fee (not applicable to ebooks, training courses, Learn or enrolment for units 991, 993 and 994 which do not include a study text):

- £7 per order: UK, Channel Islands, Isle of Man, Republic of Ireland, Malta and Gibraltar.
- £15 per order: All other countries.

Please note: These postage rates are flat fees applicable to orders from individual candidates (orders may contain more than one item). Separate fees apply to corporate bulk orders – please contact Customer Service.

Sub total £

Section E – Exam entry

I wish to enter the following exams in April/October 2017 (delete session which is not applicable) at the centre in:

First choice _____ Centre code _____

Second choice _____ Centre code _____

Unit codes	Member	Non-member	No of units	Entry fee
FIT and Certificate:				
	£61 for FIT, £106 for all other units	£76 for FIT, £147 for all other units		£
Diploma				
	£127	£174		£

- Only complete this section if you are planning to sit FIT or Certificate exams outside of the UK. To sit an exam in the UK, you must enter online at www.cii.co.uk/online or by calling Customer Service
- If you have bought the blended learning programme, an Award in London Market Insurance or 590 study package, do not include the exam fee

Additional late entry fee (See **pg 18**) £

Enter your name

Section F – 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 on the CII's website). To process this application, I am deemed to have consented to the CII processing my data.

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 permanent identity number. If you **DO NOT** wish for us to provide these details to your employer, please tick the following box. ☐

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. ☐

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. ☐

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**

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.

Terms, conditions and cancellation
I have read and agree to the terms and conditions contained in this brochure, including my right of cancellation.

Signed

Date

If ordering learning materials, please ensure you have read the important information regarding delivery on page 21.

Study options and revision aids are provided by the Education and Training Trust of the Chartered Insurance Institute (a company limited by guarantee) Registered office: 20 Aldermanbury, London EC2V 7HY. Registered Charity no. 1021017

See overleaf for total payable and method of payment.

Enter your name

Section G – Total payable and method of payment (Bacs and cheque only)

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. To pay by credit or debit card, you can order online using our secure payment gateway, which is Level 1 compliant under the PCI DSS. Alternately, call Customer Service.

Insert the total value of all items ordered in Sections B to D.

Note: All prices quoted are inclusive of VAT, where appropriate, at the current rates. Prices are subject to change without notice. Please ensure that where applicable you have included the appropriate postage fee – see Section D.

Total payable £

If you would like to receive a payment receipt, please tick one of the following delivery options (if selecting email be sure to provide your email address on the first page of the form): ☐ Email ☐ Post

Tick method of payment and, if applicable, complete the Bacs details.

☐ Cheque/bankers draft drawn on a UK bank account and payable to The Chartered Insurance Institute (please write CII PIN number if known on the reverse).

☐ Bank transfer via Bacs (using the CII account details below and including the required information).

CII account details:
HSBC Bank plc, City of London Branch, 60 Queen Victoria Street, London, EC4N 4TR
Account number: 22271044
Sort code: 40-05-30
Swift code: MIDLGB22
IBAN: GB21MIDL40053022271044

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

- **Paying 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**.
- **Paying 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

If you have a UK bank account you can spread the cost of membership by paying via monthly Direct Debit at no extra charge.

Please call CII Customer Service on +44 (0)20 8530 0852 to set up a monthly Direct Debit over the phone or complete the Direct Debit mandate below, sign the declaration in Section F and return to CII Customer Service.

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

DIRECT Debit

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.

9	9	6	6	4	5

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 ☐ I wish to pay my subscription by **annual** Direct Debit payment

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.