



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Membership: How to guide

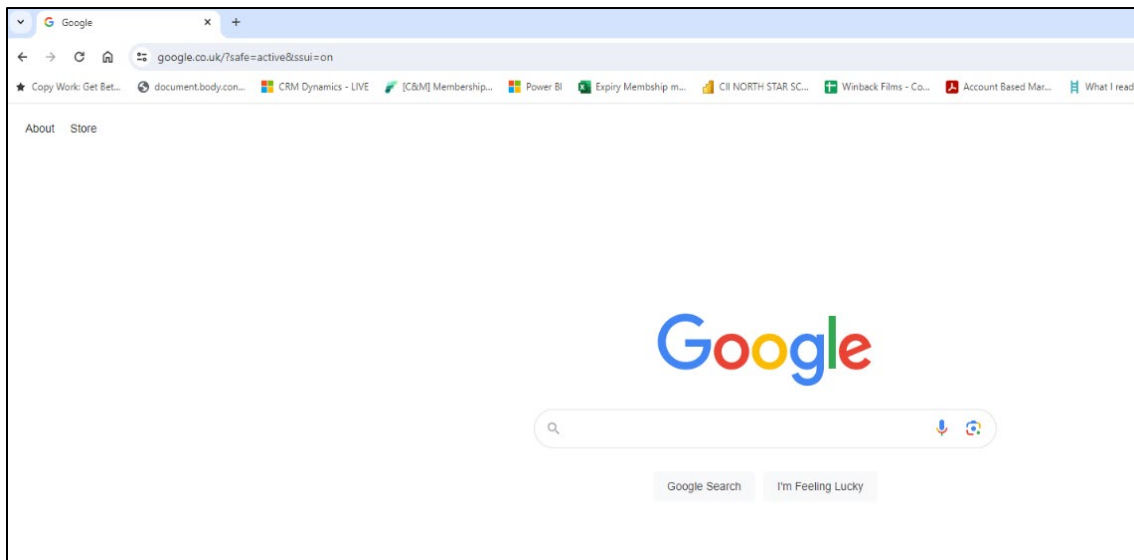
Upgrade to Chartered.

How to upgrade to Chartered Status through your CII/PFS dashboard.

This guide explains how to upgrade to Chartered Status through your CII/PFS dashboard.

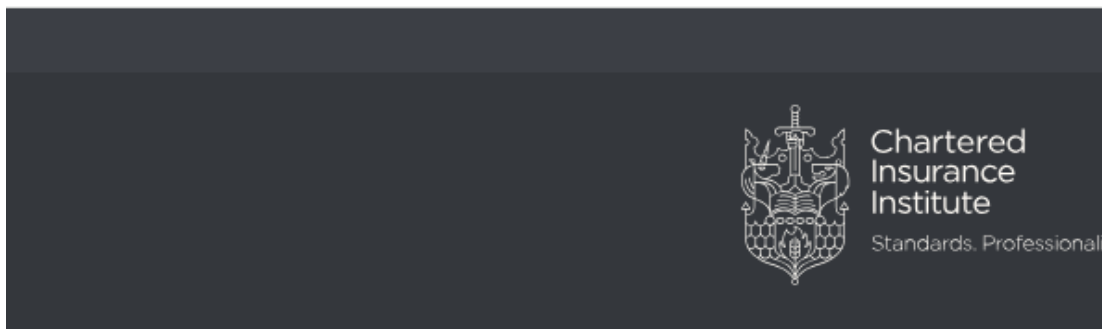
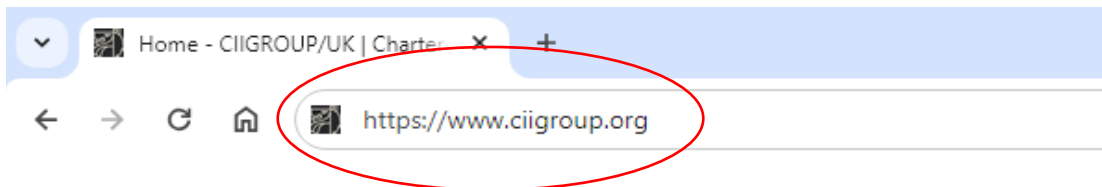
1. Begin by launching your preferred internet browser on your device.

Note: For optimal performance, we recommend using Google Chrome.

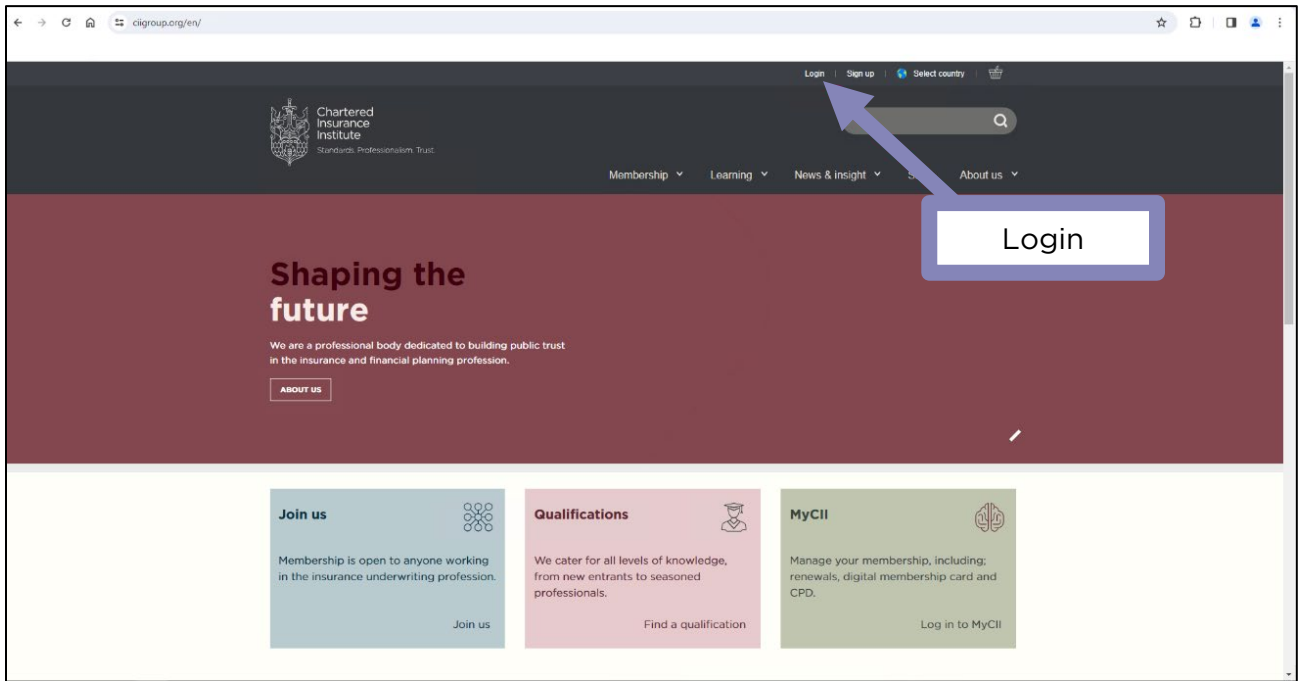


2. To access the Chartered Insurance Institute (My CII) website go to, www.ciigroup.org

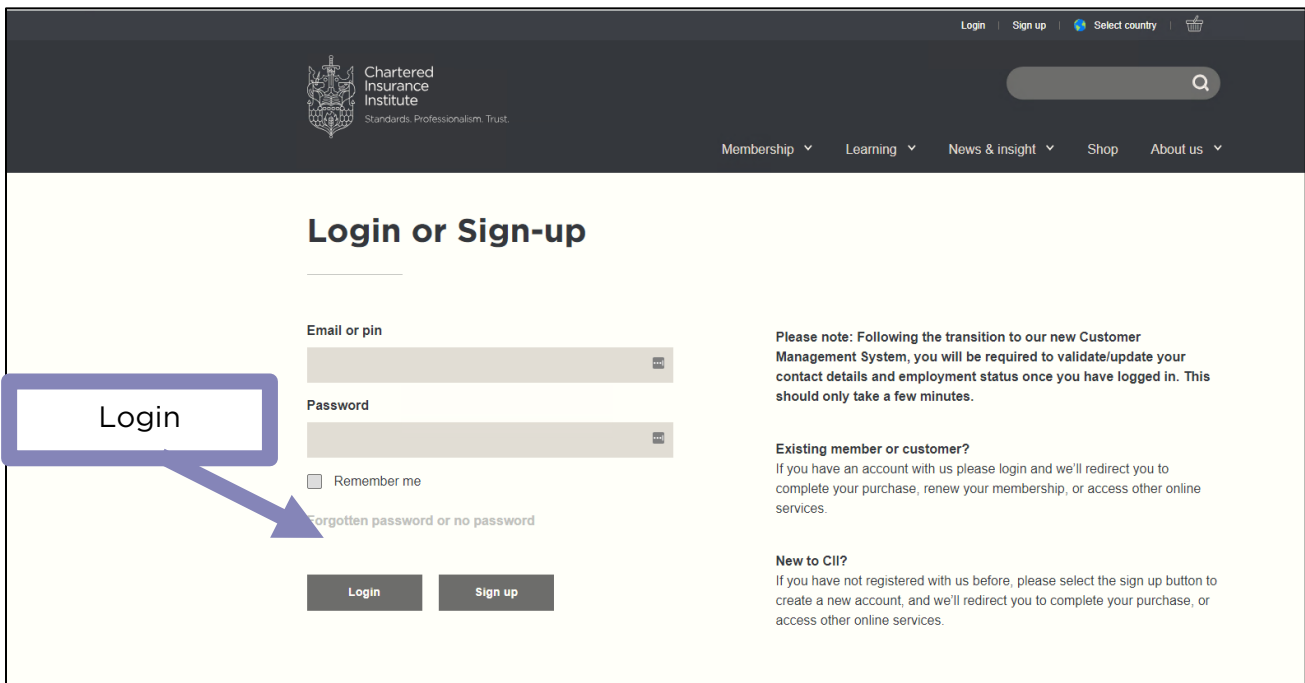
To access the Personal Finance Society (My PFS) website go to, www.thepfs.org



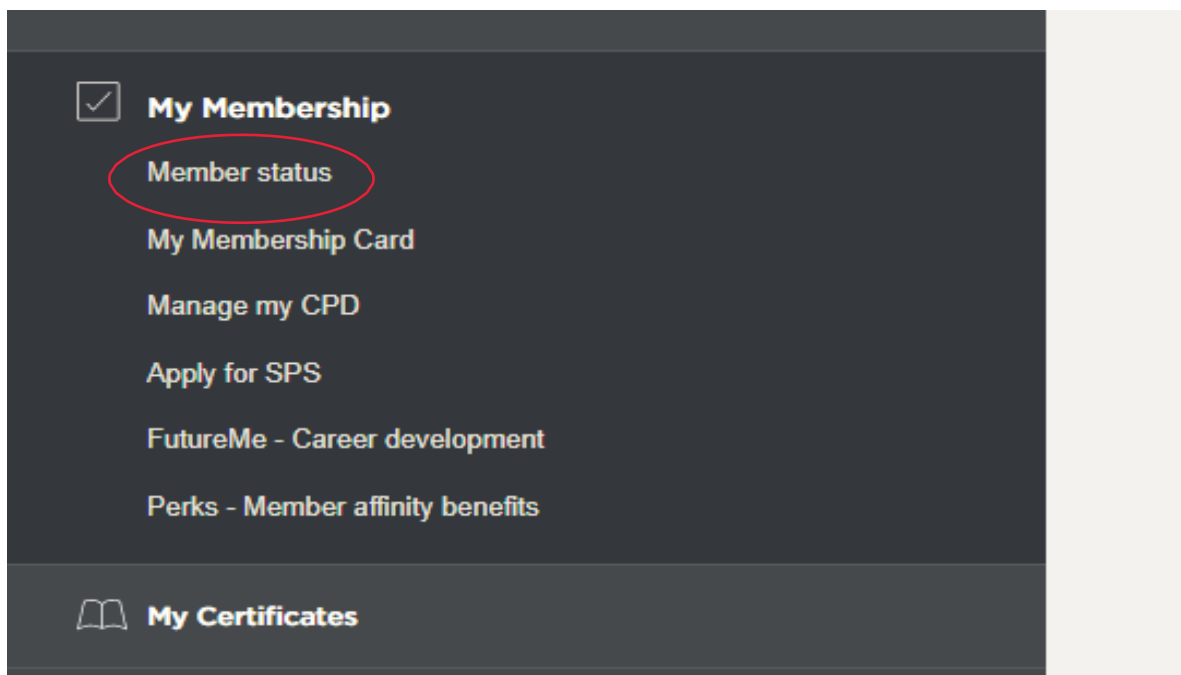
3. Once the webpage has loaded, select 'Login' on the top right-hand side.



4. Log in using your PIN or email address and password. Your PIN number can be found in your welcome to membership email.

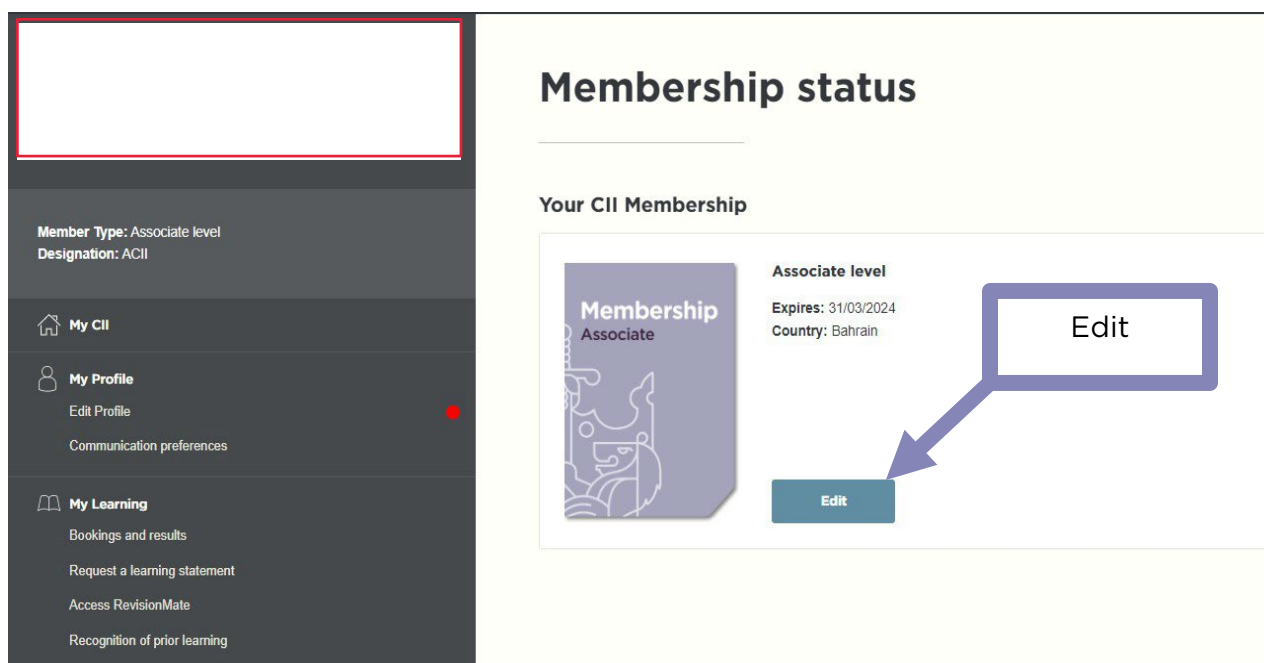


5. To upgrade to Chartered click **'Member status'** under **'My Membership'** on the left-hand side of your screen.



6. On the next screen you will see your current membership status and level.

To begin the upgrade, click **'Edit'**.



7. You will see your membership details on the next screen.

If you are eligible for Chartered, you will be asked if you want to upgrade under 'My Upgrades'.

Select, 'Yes'.

Membership updates

Membership Level: Associate membership

Society: ▼

Local Institute: ▼

Local Institute fee: \$0.00

Your personal details will appear here. Please check these are correct.

Yes



My Upgrades

You are eligible for a Chartered title. Would you like to upgrade to Chartered? Yes No

Would you like to apply for a support scheme rate?



More information on eligibility for our support schemes can be found [here](#).

Yes I am eligible for one of the support schemes

8. A list of Chartered titles will appear on screen.

Choose the title you would like to upgrade to and then select 'proceed'.

My Upgrades

You are eligible for a Chartered title. Would you like to upgrade to Chartered? Yes No

You are eligible to any one of the below Chartered titles. Please select which title you would like to upgrade to. The new membership fee, including the addition of the Chartered title, is as detailed

- | | | |
|---|--|------------------------|
| <input type="radio"/> Chartered Insurance Broker | Applies to appropriately qualified CII members (see note 1) who are carrying on business as an insurance broker. An insurance broker is an independent intermediary who acts for clients and, in respect of any product type, offers or sells the products of more than one insurer. | Yearly: £257.00 |
| <input type="radio"/> Chartered Insurer | Applies to appropriately qualified CII members (see note 1) working for insurance companies and Lloyd's underwriting agents. | Yearly: £257.00 |
| <input type="radio"/> Chartered Insurer Practitioner | | Yearly: £257.00 |
| <input type="radio"/> Chartered Insurer Risk Manager | | Yearly: £257.00 |
| <input type="radio"/> Chartered Insurance Underwriting Agent | Applies to appropriately qualified CII members (see note 1) who perform underwriting services, but who are not employed by an insurer or other capacity provider. This title is typically relevant to those working for Managing General Agents. | Yearly: £257.00 |

Would you like to apply for or continue to receive a support scheme rate? ⓘ

More information on eligibility for our support schemes can be found [here](#).

If you wish to apply for Membership Support, please contact Customer Services on +44 (0)20 8989 8464 or customer.serv@cii.co.uk

Yes I am eligible for one of the support schemes

Proceed

Proceed

9. You will now need to confirm that you meet the mandatory requirements of Chartered Status. Carefully read through and tick the mandatory declarations.

Once ticked, click 'Proceed'.

Chartered Membership details

I wish to apply to become a:

Chartered Insurer - Applies to appropriately qualified CII members (see note 1) working for insurance companies and Lloyd's underwriting agents.

Mandatory acknowledgements:

I confirm that I have five years professional experience, including three years employed full-time in the industry and that I understand and will abide by the regulations for the use of Chartered title requirements.

I confirm that I understand and will abide by the regulations for the use of the **Chartered title**

I confirm that, if at any time I cease to be a member of the CII I will return any certificate of membership to the CII.

Proceed

10. You will also need to accept the membership declaration.

Tick ' *I confirm that I accept the above declarations*' to confirm you have read and understood the declarations.

Click, 'proceed'

Membership declaration

The Chartered Insurance Institute (CII) Group is a professional body dedicated to building public trust in the insurance and personal finance professions. Suitability for membership of the CII, and its **Societies**, 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 I agree to be immediately bound by the CII's Charter, Bye-laws, Code of Ethics, rules, regulations and requirements of membership and/or the Personal Finance Society's Articles of Association and Bye-laws. I also agree to be bound by the constitution and Bye-laws of any local institute of which I become a member. Further details of membership can be found online at cii.co.uk/memberobligations

I confirm I have not:



I confirm that I accept the above declarations.

Proceed


11. Your Chartered title should now be shown in your basket, along with your current membership level and Local Institute. You may see an admission fee, but this should read £0.00. You can ignore this fee.

If you are happy with the details, click 'Proceed to checkout'.

Shopping basket

Item	Price	Qty	Subtotal	
 Associate membership	\$0.00	1	\$0.00	
Selected Chartered Title				
Chartered Insurer	\$0.00	1	\$0.00	
Local Institute* ⓘ	Society* ⓘ			
International	CII			

Please confirm if this would be CMS controlled or hardcoded

 Membership admission fee	\$0.00	1	\$0.00	
Local Institute* ⓘ	Society* ⓘ			

Please do not navigate back on your browser to continue shopping, instead click on the button below.

[Continue shopping](#)

Summary

Cart Subtotal	\$0.00
Order Total	\$0.00

Cost breakdown

Subtotal	\$0.00
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Proceed to checkout.

[Apply voucher](#)

Order Total	\$0.00
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[PROCEED TO CHECKOUT](#)

12. Click 'Place order' to confirm the upgrade.

NB: You upgrade will be free of charge unless you are in your renewal period in which case you will be charged the Chartered fee.



Review and Payment

No Payment Information Required

[Place order](#)

By placing your order you are indicating that you have read and agree to our [terms and conditions](#)

Summary


Cart Subtotal	\$0.00
Order Total	\$0.00

Cost breakdown

Subtotal	\$0.00
Tax	\$0.00
Discount	\$0.00
Order Total	\$0.00

Shipping Information

If you purchase a digital and printed option you will incur postage and packaging charges. These will be added to your order at checkout. For further information please visit our [FAQs](#).

2 Items in Basket 

Getting in touch with us

If you have any questions or issues regarding this process or your membership, please contact us on the details below.

Customer Services
Chartered Insurance Institute
tel: +44 (0)20 8989 8464
customer.serv@cii.co.uk
ciigroup.org

Customer Services
Personal Finance Society
tel: +44 (0)20 8530 0852
customer.serv@thepfs.org
thepfs.org

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