

International qualifications

2015 Information for candidates



Laying the foundations of career success

Including options for:
Financial Planning
Bancassurance
Investment Planning
General Insurance
Customer Service in Insurance



CII

www.cii.co.uk

Supporting your success

CII membership gives you the tools and ongoing support to help achieve your professional goals.

Join today and enjoy the following exclusive benefits and career support:

- **Current market information** through access to a comprehensive online library
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- **Discounts on qualifications and learning materials**
- **Market news and updates** from our award-winning membership magazine, The Journal
- **Professional designation** upon completion of relevant qualifications to demonstrate your knowledge and technical capability
- **CPD scheme** to keep your knowledge current and compliant

“

The CII helped me to succeed in my studies by providing me with access to a range of valuable learning resources and services.

”



Jennifer Yao Cert CII
Supervising Associate, Simmons & Simmons LLP



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from £37**

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Or call +44 (0)20 8989 8464

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The Chartered Insurance Institute (CII) Professionalism in practice

As the premier professional body for the financial services profession, the CII promotes higher standards of integrity, technical competence and business capability.

With over 115,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to this sector.

Success in CII qualifications is universally recognised as evidence of knowledge and understanding. Membership of the CII signals a desire to develop broad professional capability and subscribe to the standards associated with professional status.

The CII works with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Individually, CII's members are able to drive their personal development and maintain their professional standing through an unrivalled range of learning services and by adhering to the CII's Code of Ethics.

www.cii.co.uk



**INVESTORS
IN PEOPLE** | Gold

Contacting the CII

If you have any queries regarding the qualifications in this brochure please contact Customer Service.

The CII is committed to delivering a first-class service and, to this end, we welcome feedback on any aspect of your relationship with our organisation.

Please forward any views you may have on the service you receive, whether they are positive or otherwise.

We take all such comments seriously, answer them individually, and use them to help ensure that we continually improve the service we provide.

Customer Service

42–48 High Road, South Woodford,
London E18 2JP

tel: +44 (0)20 8989 8464

fax: +44 (0)20 8530 3052

email: customer.serv@cii.co.uk

website: www.cii.co.uk

Promoting professionalism

The importance of professional qualifications for financial services and insurance staff has risen sharply. Advisers and agents are the focus of particular attention as governments worldwide seek to drive up the standard of advice and product recommendation.

Across the world's financial services and insurance markets, greater importance is being placed on monitoring the behaviour of employees. There is also a growing expectation on the part of consumers and regulators that financial advisers and insurance agents should have appropriate skills and demonstrate a professional approach.

In response to this, the Chartered Insurance Institute (CII) offers a range of qualifications for those working in both regulated and non-regulated environments outside the UK.

This includes:

- Award in Financial Planning
- Award in Bancassurance
- Award in Investment Planning
- Award in General Insurance
- Award in Customer Service in Insurance
- Certificate in Insurance and Financial Services

A world of choice

CII qualifications have been completed by insurance and financial services practitioners in over 150 countries, confirming their universal appeal.

In addition to the qualifications detailed in this brochure, the CII offers a range of insurance and financial services qualifications, including options at Certificate, Diploma and Advanced Diploma levels.

These market-led qualifications cater for all levels of knowledge and experience and enjoy a high level of acclaim among professionals and organisations worldwide.

Further information on CII Certificate, Diploma and Advanced Diploma insurance and financial services qualifications can be found at www.cii.co.uk/qualifications where you can download information for candidates' brochures (also available from Customer Service).

Selecting your entry route

CII qualifications are recognised across the global financial services and insurance sector as evidence of commitment, knowledge and understanding. So, whether you work in financial advice, insurance, or both, completing a CII Award qualification can make a real difference to your career.

Candidates can choose from a number of options. The choices you make will depend on your current level of knowledge and the area of the market you operate in.

Financial advice

There are two routes for those providing financial advice to clients:

- **Route 1** – Begin with either the **Award in Bancassurance** (for those working in the banking sector), or the **Award in Financial Planning** (for those working for other providers of financial advice). Both of these single unit qualifications deliver the essential knowledge needed by anyone giving financial advice.

After this you can progress to the **Award in Investment Planning**, the next step in developing your knowledge and understanding of investments.

- **Route 2** – If you are an experienced financial adviser who already has a solid understanding of financial advice principles and products, and want to develop your knowledge of investments, you may enter directly for the **Award in Investment Planning**.

Insurance

If you advise on insurance products, or have aspirations to do so, the **Award in General Insurance** provides an ideal starting point for developing your knowledge and understanding.

From this you can progress to the **Award in Customer Service in Insurance** if you are in a customer-facing insurance role, the **Award in Bancassurance** if you work in a bank environment and also provide financial advice to clients, or the **Certificate in Insurance**, if you want to broaden your knowledge of insurance. For more on the Certificate in Insurance go to www.cii.co.uk/cert-insurance

Financial advice and insurance

Candidates who provide financial advice and also act as insurance agents are able to follow a dedicated study path which leads to the completion of the **Certificate in Insurance and Financial Services**. See overleaf for further details.

Award in Financial Planning

Overview

This single-unit qualification provides a solid grounding in the core financial and life assurance products. It also covers what constitutes sound professional practice, thereby providing a framework for ethical behaviour.

Who is it for?

- Non-UK financial advisers and insurance agents working outside the banking sector.
- Non-UK financial advisers needing to satisfy the minimum operating standards set by a local regulator.

What candidates will learn

At the end of this qualification, candidates will be able to demonstrate their knowledge and understanding in the following areas:

- the client's needs
- the fact-finding process
- good practice
- protection products
- savings and investment products
- pension products.

Entry requirements

None

Completion requirements

To complete you need to obtain **15 CII credits** by passing unit (AWF) Award in Financial Planning.

Package contents

- Printed study text (changing to ebook and printable PDF from 01 May 2015)
- Exam guide
- First exam entry.

Exam format

- 2 hour exam
- 75 multiple choice questions
- 70% nominal pass mark²
- Results released after 5 weeks.

Price

£188

Study hours

60

2015 exams

Apr/Oct

CII member designation¹

CII (Award)

More details and to enrol online

www.cii.co.uk/award-financial-planning

Award in Bancassurance

Overview

This single-unit qualification provides a solid grounding in the relevant core financial, life assurance and insurance products. It also covers what constitutes sound professional practice, thereby providing a framework for ethical behaviour.

Who is it for?

Non-UK financial advisers and insurance agents working in the banking sector and operating in either a regulated or non-regulated environment.

What candidates will learn

At the end of this qualification, candidates will be able to demonstrate their knowledge and understanding in the following areas:

- main elements of the financial services and insurance industry as it relates to the bancassurance sector
- the main insurance products
- savings and investment products
- retirement planning products
- the importance of the client fact find and how to identify client needs
- what constitutes good client practice
- ethical considerations of a financial adviser.

Entry requirements

None

Completion requirements

To complete you need to obtain **15 CII credits** by passing unit (AWB) Award in Bancassurance.

Package contents

- Printed study text (changing to ebook and printable PDF from 01 May 2015)
- Exam guide
- First exam entry.

Exam format

- 2 hour exam
- 75 multiple choice questions
- 70% nominal pass mark²
- Results released after 5 weeks.

¹ PFS/CII membership and Continuing Professional Development requirements apply.

² The actual pass mark may vary from one session to another, depending on the level of difficulty, to ensure that the pass standard remains constant.

Award in Investment Planning

Overview

This single-unit qualification is designed to help experienced advisers develop and demonstrate their knowledge of investment products. It also covers what constitutes sound professional practice, thereby providing a framework for ethical behaviour.

Who is it for?

Experienced non-UK financial advisers and insurance agents advising on, or aspiring to advise on, investment planning. These individuals will usually hold one or more of the other Award qualifications.

What candidates will learn

At the end of this unit, candidates will be able to demonstrate their knowledge and understanding in the following areas:

- main macro-economic factors that impact upon investment returns
- cash deposit investments, government securities and corporate bonds
- equity based investment products
- property investment
- collective investment products and alternative investments
- the risks faced by investors and the importance of asset allocation in the investment process
- ethical considerations of a financial adviser.

Entry requirements

None, although you are required to already have a good understanding of financial advice principles and products.

Completion requirements

To complete you need to obtain **10 CII credits** by passing unit (AWF) Award in Investment Planning.

Package contents

- Printed study text (changing to ebook and printable PDF from 01 May 2015)
- Exam guide
- First exam entry.

Exam format

- 1 hour exam
- 50 multiple choice questions and 2 case studies each comprising 4 multiple choice questions
- 70% nominal pass mark²
- Results released after 5 weeks.

Price

£107

Study hours

60

2015 exams

Apr/Oct

CII member designation¹

CII (Award)

More details and to enrol online

www.cii.co.uk/award-investment-planning

Award in General Insurance

Overview

This single-unit qualification is ideal for those starting their careers in the insurance sector. It helps develop a basic understanding of insurance principles, procedures and products.

Who is it for?

- Non-UK insurance practitioners at the start of their career or seeking to build on existing knowledge through formal study.
- Non-UK insurance practitioners needing to satisfy the minimum operating standards set by a local regulator.

What candidates will learn

- At the end of this unit, candidates should be able to demonstrate their knowledge and understanding in the following areas:
- basic principles of insurance
- main legal principles related to insurance contracts
- main regulatory principles related to insurance business
- key elements to protect consumers
- key aspects of ethics, corporate governance and internal controls.

Entry requirements

None

Completion requirements

To complete you need to obtain **15 CII credits** by passing unit (W01) Award in General Insurance.

Package contents

- Printed study text (changing to ebook and printable PDF from 01 May 2015)
- Exam guide
- First exam entry.

Exam format

- 2 hour exam
- 100 multiple choice questions
- 70% nominal pass mark²
- Results released after 5 weeks.

Price

£107

Study hours

50

2015 exams

Apr/Oct

CII member designation¹

CII (Award)

More details and to enrol online

www.cii.co.uk/award-general-insurance

Award in Customer Service in Insurance

Overview

This single-unit qualification is designed for those working in customer facing roles in insurance outside the UK. It helps build the skills and knowledge required to deliver excellence in customer service.

Who is it for?

- Non-UK insurance practitioners at the start of their career.
- Customer facing staff or those looking to move into such a role.
- Sales support and claims settlement staff within intermediaries and providers.

What candidates will learn

At the end of this qualification, candidates will be able to demonstrate their knowledge and understanding in the following areas:

- how to fulfil customer requirements in the insurance sector
- the importance of customer feedback to improve service in the insurance sector
- the importance of good communication to maintain and build client relationships in the insurance industry
- how to deal with conflict within an insurance environment
- the importance of keeping accurate and confidential records when dealing with customers
- how to manage own workload and time to meet business requirements and timescales
- how to work with others to achieve team and organisational objectives
- the sales process
- how to increase sales activities.

Entry requirements

None

Completion requirements

To complete you need to obtain **15 CII credits** by passing unit (W04) Award in Customer Service in Insurance.

Package contents

- Printed study text (changing to ebook and printable PDF from 01 May 2015)
- Exam guide
- First exam entry.

Exam format

- 1.5 hour exam
- 50 multiple choice questions written to 10 case studies
- 70% nominal pass mark²
- Results released after 5 weeks.

Price

£107

Study hours

50

2015 exams

Apr/Oct

CII member designation¹

CII (Award)

More details and to enrol online

www.cii.co.uk/award-customerservice

Certificate in Insurance and Financial Services

Overview

For those candidates outside the UK who provide financial advice and also act as insurance agents, or aspire to do both, the CII offers a dedicated study pathway which comprises existing Award qualifications and results in the completion of the Certificate in Insurance and Financial Services.

The Certificate offers a solid grounding across a broad range of areas and is awarded upon completion of three Awards from the following four options:

- Award in Insurance;
- Award in Customer Service in Insurance;
- Award in Financial Planning; or
- Award in Bancassurance;
- Award in Investment Planning.

CII members are also eligible to use the designation 'Cert CII'. Continuing Professional Development requirements apply.

Why study with the CII?

CII Award qualifications deliver many advantages:

- Dependent upon your selected qualification you will gain:
 - an introduction to the fundamentals of financial advice, products and professional conduct (including a focus on bancassurance where required)
 - specialist investment knowledge
 - the fundamentals of insurance (including a focus on customer service skills where required).
- Embarking on study will demonstrate your commitment to learning and development. These are the essential starting points for anyone who is serious about a career in financial services and/or insurance.
- These qualifications focus on the core principles of financial advice and/or insurance products and professional conduct, making them universally relevant.
- Upon completion you are entitled to use the designation 'CII (Award)' if you are a CII member, providing a means of demonstrating educational achievement to the public and to peers. Continuing Professional Development requirements apply.
- Upon completion of three specified Award qualifications, you will be awarded the Certificate in Insurance and Financial Services (see above for further details). If you are a CII member you will be eligible to use the industry respected designation 'Cert CII'. Continuing Professional Development requirements apply.
- Holding a CII qualification differentiates you from other advisers and insurance practitioners, providing a competitive edge.
- Each Award qualification entry comes as a complete package for a single fee: study text, examination guide and examination sitting.
- The Award qualifications each provide 15 (or 10 in the case of the Award in Investment Planning) Certificate-level credits towards completion of the CII's higher level qualifications (subject to completion requirements).

¹ PFS/CII membership and Continuing Professional Development requirements apply.

² The actual pass mark may vary from one session to another, depending on the level of difficulty, to ensure that the pass standard remains constant.

		April 2015	October 2015
Exam deadlines	Closing date for your exam entry and payment to reach the CII		
	<ul style="list-style-type: none"> At normal fees (changes to exam entries, etc. not accepted after these dates) At late entry fee 	04 Mar 15 27 Mar 15	02 Sep 15 25 Sep 15

Once entered for an exam you'll receive:

- an **exam entry confirmation**, posted within seven working days from receipt of your application
- an **exam admission permit**, posted ten working days before the exam begins or six weeks for non-UK applicants.

Exam sittings	Exams are scheduled on the following dates	13 Apr 15	12 Oct 15
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Exam results	Results are released online at www.cii.co.uk/results (you will need to log in using your CII PIN and password) and sent by 1st class post on the following dates. Please allow 14 days for delivery to a non-UK address.	22 May 15	20 Nov 15
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Entry for the next exam	You do not have to wait for your results before entering for an exam in the next session
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Important information for written exam entrants

- Please contact Customer Service if you do not receive your exam entry confirmation or exam admission permit, either by emailing admissionperitenquiries@cii.co.uk or calling +44(0)20 8989 8464.
- When you receive your exam admission permit you must read it in full and check whether any change has been made to the date or times of the units for which you have entered and that the units shown on your permit are those that you intend to sit. If there is any discrepancy you should contact Customer Service immediately.
- By taking a CII exam you are agreeing to the regulations stated on the exam admission permit as well as those detailed at www.cii.co.uk/exampolicies

Exam timetable

The following dates and times apply to Award exams in 2015. The CII reserves the right to make changes to the published dates where necessary.

Exam unit	Date	Time
Award in Financial Planning	13 Apr	16:30
	12 Oct	
Award in Bancassurance	13 Apr	13:00
	12 Oct	
Award in Investment Planning	13 Apr	09:30
	12 Oct	
Award in General Insurance	13 Apr	09:30
	12 Oct	
Award in Customer Service in Insurance	13 Apr	13:00
	12 Oct	

Entering your chosen qualification

There are three ways to enter for your chosen qualification:

- Online at www.cii.co.uk/qualifications
- Phone on **+44 (0)20 8989 8464**
- Post/fax using the application form at the back of this brochure.

Please allow 21 days from our receipt of your order for delivery of your study materials.

2015 fees

Each Award qualification includes a printed study text (changing to ebook and printable PDF from 01 May 2015), examination guide and one exam entry for a single fee (which applies to exam entries received before the normal closing date). These fees are shown against each qualification on pages 3–5.

Late entry fee

For exam entries received after the normal closing date, up to two weeks before the session, the normal fee is payable together with a late entry fee of £82 per unit. This is subject to space being available at the exam centre.

Change of session or centre

Change after entry: £43

Changes must be requested before the relevant closing date for exam entry at normal fee. Multiple changes will be covered by a single fee provided they are submitted together.

After the final closing date (at normal fee) no changes, apart from your address or name (which must be supported by original or certified evidence), can be made to your exam entry. If you wish to withdraw at this stage you will not receive a refund except in the case of illness. Absence from an exam with medical evidence (to be received within two months of the date of the exam), will enable you to apply for your entry to be transferred to the next available session.

Exam re-sits

Qualification	Exam re-sit fee per entry
Award in Financial Planning and Award in Bancassurance	£82
Award in Investment Planning, Award in General Insurance and Award in Customer Service in Insurance	£54

CII membership

If you are not already a CII member, you can become a member when you enrol for an Award qualification. Membership of the CII is open to anyone wholly/mainly employed or engaged in work connected with the financial services or insurance industry. If you wish to apply for membership and it is not clear from your application form that you work in financial services, please provide brief details of the nature of your work and the proportion of your time spent on financial services or insurance matters on a separate sheet of paper.

For membership fees see **page 2** of the application form at the back of this brochure.

Associated or affiliated institutes

If you live in an area where an associated or affiliated institute is established (see following list) you should apply to the secretary of the institute concerned for details of local membership. Contact details can be found at www.cii.co.uk/affiliated-institutes

Individuals living outside the UK who are members of an associated or affiliated institute may enter the CII exams and purchase study materials at the same prices as those charged to members of the CII. Associated/affiliated institute membership number must be provided as proof of membership.

Associated institutes:

Ireland (Cork, Dublin, Galway, Limerick, Sligo).

Overseas affiliated institutes:

The Australian and New Zealand Institute of Insurance and Finance (ANZIIIF), The Insurance Institute of the Bahamas, The Insurance Institute of Barbados, The Bermuda Insurance Institute, The Insurance Institute of Canada, Taiwan Insurance Institute (The Insurance Institute of the Republic of China), The Insurance Institute of Cyprus, The Insurance Institute of Egypt, Emirates Insurance Association, The Insurance Institute of Ghana, The Insurance Institute of Guyana, The Insurance Institute of Harare, The Insurance Institute of Hong Kong, Institute of Insurance and Risk Management (IIRM), The Insurance Institute of India, The Indonesian Insurance Institute (AAMAI), The Insurance Institute of Jamaica, The Insurance Institute of Kenya, The Insurance Institute of Lilongwe, The Insurance Institute of Malawi, The Malaysian Insurance Institute, The Insurance Institute of Mauritius, The Insurance Institute of Namibia, The Netherlands Institute for Banking, Insurance and Investment (NIBE-SVV), The Chartered Insurance Institute of Nigeria, The Pakistan Insurance Institute, The Insurance Institute of Papua New Guinea, The Philippines Insurance Institute, Inc, University of Insurance and Banking, Poland, The Insurance Institute of Riyadh, St Lucia Insurance Institute, Singapore Insurance Institute, The Insurance Institute of South Africa, The Sri Lanka Insurance Institute, The Insurance Institute of Tanzania, Trinidad & Tobago Insurance Institute, The Insurance Institute of Uganda, West African Insurance Institute (WAI), The Insurance Institute of Zambia, The Insurance Institute of Zimbabwe.

Study option, revision aids and exam fees

Details of all applicable fees are included on the application form. Payment must be made by one of the methods shown on the form.

In the case of bank transfers, a copy of the stamped remittance advice should be sent together with your application form in the usual way. Funds should be remitted to:

HSBC Bank plc, City of London Branch,
60 Queen Victoria Street, London EC4N 4TR, UK

Sort code: 40-05-30

Account number: 22271044

Account name: Chartered Insurance Institute

International Bank Account Number (IBAN):

GB21MIDL40053022271044

Branch Identifier Code: MIDLGB2141W

Please be sure to quote the following:

SWIFT code: MIDLGB22

CII PIN or your name and date of birth.

To ensure that the transfer is made, you must pay any charges made by your bank locally, and by our bank in London.

All remittances must be in Sterling.

The charging of fees to your card does not in itself guarantee entry to the exam. An acknowledgement will be sent when your application form has been processed.

International exam centres

Places are allocated on a first-come, first-served basis.

Centre	Code	Centre	Code
North America		Vilnius (Lithuania)	729
Chicago (USA)	435	Warsaw (Poland)	700
Nova Scotia (Canada)	663	Yerevan (Armenia)	719
Toronto (Canada)	531	Central Asia	
Caribbean		Almaty (Kazakhstan)	712
Bridgetown (Barbados)	423	Baku (Azerbaijan)	608
Castries (St Lucia)	595	West & Central Africa	
Freeport (Bahamas)	570	Accra (Ghana)	401
George Town (Grand Cayman)	597	Cameroon (Buea)	673
Grand Turk (Turks & Caicos Islands)	702	Freetown (Sierra Leone)	449
Kingston (Jamaica)	471	Lagos (Nigeria)	476
Nassau (Bahamas)	498	Horn and East Africa	
Port of Spain (Trinidad)	511	Addis Ababa (Ethiopia)	402
St John's (Antigua)	605	Dar Es Salaam (Tanzania)	441
Central America		Asmara (Eritrea)	710
Belize City (Belize)	577	Kampala (Uganda)	465
Mexico City (Mexico)	488	Khartoum (Sudan)	469
South America		Kigali (Rwanda)	415
Buenos Aires (Argentina)	685	Mombasa (Kenya)	490
Bogota (Colombia)	421	Nairobi (Kenya)	497
Georgetown (Guyana)	451	Southern Africa	
Lima (Peru)	542	Blantyre (Malawi)	548
Rio de Janeiro (Brazil)	514	Bulawayo (Zimbabwe)	426
Santiago (Chile)	730	Gaborone (Botswana)	618
Europe		Harare (Zimbabwe)	517
Athens (Greece)	411	Johannesburg (South Africa)	463
Barcelona (Spain)	557	Lilongwe (Malawi)	615
Berne/Basel (Switzerland)	568	Lusaka (Zambia)	480
Bucharest (Romania)	706	Ndola (Zambia)	499
Budapest (Hungary)	676	North Africa,	
Cologne (Germany)	448	Middle East & Gulf	
Copenhagen (Denmark)	438	Abu Dhabi (UAE)	609
Gibraltar	452	Amman (Jordan)	408
Helsinki (Finland)	705	Manama (Bahrain)	414
Istanbul (Turkey)	461	Beirut (Lebanon)	675
Kiev (Ukraine)	405	Cairo (Egypt)	427
Madrid (Spain)	482	Dammam (Saudi Arabia)	407
Milan (Italy)	489	Doha (Qatar)	617
Moscow (Russia)	649	Dubai (UAE)	547
Munich (Germany)	594	Jeddah (Saudi Arabia)	553
Nicosia (Cyprus)	501	Safat (Kuwait)	475
Paris (France)	503	Muscat (Oman)	587
Riga (Latvia)	701	Riyadh (Saudi Arabia)	572
Rotterdam (Netherlands)	642	South Asia	
Sofia (Bulgaria)	417	Ahmedabad (India)	659
Tbilisi (Georgia)	713	Bangalore (India)	661
Valetta (Malta)	535	Bhopal (India)	668
		Chandigarh (India)	434
		Chennai (India)	481

Centre	Code	Centre	Code
Colombo (Sri Lanka)	437	South East Asia	
Delhi (India)	442	Bangkok (Thailand)	416
Dhaka (Bangladesh)	440	Ho Chi Minh City (Vietnam)	711
Hyderabad (India)	724	Jakarta (Indonesia)	443
Islamabad (Pakistan)	718	Kuala Lumpur (Malaysia)	472
Jaipur (India)	662	Pasig City (Philippines)	672
Karachi (Pakistan)	468	Phnom Penh (Cambodia)	728
Kolkata (India)	727	Singapore	521
Lahore (Pakistan)	477	Australasia	
Lucknow (India)	665	Sydney (Australia)	526
Mumbai (India)	422	Indian Ocean	
Patna (India)	505	Port Louis (Mauritius)	510
Pune (India)	731	Mahe (Seychelles)	607
Thiruvananthapuram (India)	667	Malé (Maldives)	664
East Asia		Atlantic	
Beijing (China)	670	Hamilton (Bermuda)	456
Hong Kong	457	St Helena	669
Seoul (Korea)	627		
Shanghai (China)	671		
Taipei (Taiwan)	527		
Tokyo (Japan)	546		

Note: Occasionally, examinations may have to be held at locations other than those listed above.

Please remember to check your admission permit to confirm all details of your examination.

UK candidates

Examinations for the Award qualifications detailed in this brochure are intended for candidates operating outside the UK and are therefore not available to sit in the UK.

Copyright

All CII study materials are copyrighted. By placing an order you undertake to use the materials for your own purposes only and not to sell, lend or give them to anyone else. Any form of copying of materials is prohibited.

Delivery

From the date of receipt by the CII of your order please allow 10 days within the UK or 21 days outside the UK for delivery of printed materials. Materials sent within the UK require a signature; please ensure that there will be someone to accept delivery at the address shown on the form.

For material delivered electronically (such as ebooks) we aim for same day delivery for orders before midday Monday to Friday (customers receive an email to confirm their purchase is ready to download).

Your right to cancel

In accordance with The Consumer Contracts (Information, Cancellation and Additional Charges) Regulations 2013 you have a right of cancellation in respect of the Products and Services sold by the CII, which right shall (subject to the Regulations) expire fourteen calendar days from the day on which either the Products are received by you, or a person nominated to receive the Products on your behalf, or your order for Services is accepted by the CII.

Note: No right of cancellation or refund is available in respect of ebooks or any other electronic download of the Products and Services once the download has started. You acknowledge that, by commencing the download of the Products or Services, your right to cancel under 29(1) of the Regulations will be lost.

Should you wish to cancel, notice should be sent to Customer Service. Where Products have been supplied to you prior to such cancellation they must be returned to us, in the condition in which

they were supplied to you, at your expense. Reimbursement for any monies paid by you which relate to the cancellation will be sent to you within fourteen days of receiving the notice of cancellation or if Products are to be returned to us, within fourteen days of their receipt or proof of sending.

Any request for entry to an exam received less than 14 days before the exam date shall be treated as express consent for the CII to provide a service. This express consent will also be treated as formal acknowledgement by you that your rights to cancellation under Regulation 29(1) of the Regulations will be lost upon receipt of your application form by the CII.

In the event of less than fourteen days notice of cancellation being given in respect of an entry for an exam sat online, and if, where applicable, the CII is unable to recover costs suffered as a result of such short notice cancellation, then the CII can recover these costs from you.

Additional terms and conditions

Please note there are additional terms and conditions which apply to all purchases of goods or services from the CII which you agree to be bound by upon completion of your order. By taking a CII exam you are agreeing to the regulations detailed on the exam admission document sent to your correspondence address prior to the exam date. Full details of these terms, conditions and regulations can be found at www.cii.co.uk/exampolicies and www.cii.co.uk/tandc

Equal opportunities

The CII is committed to creating and maintaining conditions which give access to its education and assessment provision regardless of age, disability gender reassignment, pregnancy, maternity, marriage/civil partnership, race, religion and belief, sex or sexual orientation.

Access arrangements

Provisions can be made for candidates taking CII exams who have different educational requirements or disabilities. To find out more information including how to request reasonable adjustments visit www.cii.co.uk/exampolicies

CII appeals procedure

The CII is committed to open and fair processes and as part of this process runs a transparent appeals process.

For more information visit www.cii.co.uk/appeals

Once you have read the notes on completing your application, you can either:

- complete and submit your application online at www.cii.co.uk/qualifications
- phone through your order to Customer Service on +44 (0)20 8989 8464 ensuring that you have your credit/debit card details ready
- complete the form below and post or fax +44 (0)20 8530 3052 to Customer Service.

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? Yes No (Please tick)

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 Male Female (Please tick) 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 or other electronic products.**

Tick address to be used for postal correspondence Home Work

Please tick one box per category

Type of organisation

(Insurance)

- Bank/Building Society Broker/Intermediary Consultancy Insurance company Legal
- Lloyd's Loss adjuster/Loss assessor Reinsurance company/broker Other

(Financial services)

- Accountant Appointed representative – Network Appointed representative – Other Bank/Building Society Directly authorised advice firm
- Mortgage broker Other Product provider/Fund manager/Service provider

Area of work

(Insurance)

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

(Financial services)

- Actuarial Administration/Processing Advising clients Business Development Compliance/Regulation
- Finance HR/Training Marketing Paraplanning Technical
- 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

Is your employer a member of a network or does it work with a compliance services provider? Yes No

If yes, please specify

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 8**) 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.

Please note: These discounts are only available to current associated or affiliated members and false applications may result in exclusion from future CII exams.

Name of institute Current membership no

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

By becoming a member of the CII you agree to be bound by the CII's Charter, Bye-laws, Code of Ethics, rules, regulations and requirements of membership. 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 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 are forums of the CII which provide a range of services in support of individuals working in specific industry sectors – further information can be found at www.cii.co.uk/faculties

In applying for CII membership 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 Claims London Market Underwriting (For general insurance company employees) Life & Pensions

Membership fees

- An admission fee of £37 is payable by **ALL** applicants
- Please then select the appropriate member fee.

	International	Channel Isles	Low GDP *	
Annual subscriptions	£53	£73	£37	Sub total £ <input type="text"/>

* This discounted membership fee is available to individuals resident in the following low GDP countries:

Afghanistan, Armenia, Bangladesh, Benin, Bhutan, Bolivia, Burkina Faso, Burundi, Cambodia, Cameroon, Cape Verde, Central African Republic, Chad, China, Comoros, Congo (Dem. Republic of), Cote d'Ivoire, Djibouti, Egypt, El Salvador, Eritrea, Ethiopia, Gambia, Georgia, Ghana, Guatemala, Guinea, Guinea-Bissau, Guyana, Haiti, Honduras, India, Indonesia, Kenya, Kiribati, Korea (Dem. Peo. Rep. of), Kosovo, Kyrgyzstan, Lao People's Democratic Rep., Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Micronesia, Mongolia, Morocco, Mozambique, Myanmar, Nepal, Nicaragua, Niger, Nigeria, Pakistan, Papua New Guinea, Paraguay, Philippines, Republic of Moldova, Rwanda, Samoa, Sao Tome and Principe, Senegal, Sierra Leone, Solomon Islands, Somalia, Sri Lanka, Sudan, Swaziland, Syrian Arab Republic, Tajikistan, Tanzania (United Rep. of), Thailand, Timor Leste, Togo, Uganda, Ukraine, Uzbekistan, Vanuatu, Vietnam, West Bank and Gaza, Yemen, Zambia, Zimbabwe.

(to include the £37 admission fee)

Enter your name

Section D – Study options

I wish to enrol for the following qualification(s):

Qualification	CII use	Member	Non-member	Total
Award in Financial Planning	AWF	£188	£188	£
Award in Bancassurance	AWB	£188	£188	£
Award in Investment Planning	AWP	£107	£107	£
Award in General Insurance	W01	£107	£107	£
Award in Customer Service in Insurance	W04	£107	£107	£

Sub total £

Postage fee:

- £7 per order:** Channel Isles, Isle of Man, Republic of Ireland, Malta and Gibraltar.
- £15 per order:** All other countries (excl. UK).

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 – contact Customer Service for details.

Postage fee £

Section E – Exam entry

I wish to sit my chosen exam(s) at the following international centre (refer to pages 8-9 for the list of available centres):

Centre name Centre code

Qualification	Please tick required 2015 session	
	April	October
Award in Financial Planning	<input type="checkbox"/>	<input type="checkbox"/>
Award in Bancassurance	<input type="checkbox"/>	<input type="checkbox"/>
Award in Investment Planning	<input type="checkbox"/>	<input type="checkbox"/>
Award in General Insurance	<input type="checkbox"/>	<input type="checkbox"/>
Award in Customer Service in Insurance	<input type="checkbox"/>	<input type="checkbox"/>

Additional late entry fee (See pg 7) £

Exam re-sit (See pg 7) £

International qualifications application form – ICI006 (12/14)

Enter your name

Section F – Total payable and method of payment

Insert the total value of all items ordered in Sections C to E.

Total payable £

Note: Prices are subject to change without notice. Please ensure that where applicable you have included the appropriate postage fee – see Section D.

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 card details.

Cash/cheque payable to The Chartered Insurance Institute (please write CII PIN number if known on the back of the cheque).

Note: All remittances must be in Sterling. Cash should only be sent by recorded delivery. No liability can be accepted by the CII for cash sent via post. Payment from countries outside the UK must be made by banker's draft, payable in Sterling to the CII drawn on a UK bank, or by credit/debit card (Visa, Mastercard, Maestro, Solo or Delta).

Credit/debit card: Please debit my/our account with the total cost of the goods and services ordered on this form, according to the CII's prices at the time of processing.

Type of card (please tick) VISA MASTERCARD DELTA MAESTRO SOLO

Valid from* Expiry date* Issue number* (Solo/Maestro only)

Card number*

*Please complete according to the information on your credit/debit card.

Cardholder's Signature

Date

Section G – Declarations

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, provide your employer with details of your assessment record and accreditation, including all attempts and future entries, along with your CII permanent identity number, unless you 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. The CII will assume you consent to us using your data in this way, unless you 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 any local events, products and services that complement those offered by the CII. The CII will assume that you consent to us using your data in this way, unless you tick the following box.

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.

Cardholder's signature

Date

Please allow 21 days from receipt of your correctly completed application form for delivery outside the UK.

Materials sent within the UK require a signature; please ensure there will be someone to accept delivery at the specified address shown on the form.

Please fax the completed form if paying by credit/debit card on +44 (0)20 8530 3052 or send with your cheque to
CII, Customer Service, 42–48 High Road, South Woodford, London E18 2JP.

“ We firmly believe that enhancing technical skills and capability are key to the provision of professional advice and helping to raise standards in the insurance industry in the Middle East region.

At Nexus, we encourage and support all our people to complete CII qualifications and are working towards making completion of both the Award in Financial Planning and Award in Investment Planning mandatory for all our advisers.

Together, the two awards provide the necessary grounding to develop sound professional practice and, ultimately, a better service for our customers. ”

Mahmoud Nodjoumi
Founder and Chairman,
Nexus Group


NEXUS

The Chartered Insurance Institute 42–48 High Road, South Woodford, London E18 2JP
tel: **+44 (0)20 8989 8464** fax: **+44 (0)20 8530 3052** email: **customer.serv@cii.co.uk** website: **www.cii.co.uk**

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