



Reference: (CII use only)

# Individual Chartered status

### Important notes:

Please complete all sections of this form in **BLOCK CAPITALS** and return to:  
**CII Customer Service, 42-48 High Road, South Woodford, London E18 2JP**

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. Your name should be entered as you wish it to appear on all CII official documents.)

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

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

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

## Section A – Personal details continued

### 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

## Section B – Declarations

### I wish to apply to become a:

- Chartered Insurer** – applies to appropriately qualified CII members (see note 1) working for insurance companies and other risk carriers such as Lloyd's syndicates
- Chartered Insurance Practitioner** – applies to appropriately qualified CII members (see note 1) who work as insurance intermediaries or loss adjusters, in trade and professional bodies and in other insurance-related occupations.
- 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.
- Chartered Insurance Risk Manager** – applies to qualified CII members working within the insurance sector and in the wider commercial environment who are responsible for the identification, assessment and control of risk.
- 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.

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](http://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 judgment 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

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 [cii.co.uk/dataprotection](http://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](http://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](http://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](mailto: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

# Section B - Declarations

## 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](mailto:customer.serv@cii.co.uk)

## Chartered title requirements

- I confirm that I understand and will abide by the regulations for the use of Chartered title requirements (Section C).
- 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.

Signature

Date

# Section C - Notes

## 1. General regulations for the use of Chartered titles

Fellows and Associates of the CII group can apply provided they:

- a. are applying for a title that relates to their occupation, and;
- b. have five years professional experience in the industry (not necessarily post-qualification) of a kind satisfactory to the Institute, and
- c. have passed their examinations with a combination of subjects as may be specified from time to time by the CII or approved in any individual case by the CII, and;
- d. are up to date with the Continuing Professional Development (CPD) requirements in accordance with CII rules.

Chartered title holders should only use the title in an individual capacity. It should not be used in a manner applying to firms, partnerships or corporate bodies. The titles must be used in full without abbreviation.

Fellows and Associates whose applications are approved will be issued with a certificate of entitlement. Any Chartered title holder whose occupation or employment changes so as to cause them to cease to be eligible shall notify the CII and return their certificate. Such notification shall not be required in the event of a temporary period of unemployment. The CII may, at its discretion, issue an appropriate new certificate, or might require further details or a renewed application for this purpose.

## 2. Notes for applicants to Chartered status

This Chartered title is available exclusively to members who have reached CII Associate or Fellowship level.

- Their use is conditional on due application to, and authorisation by, the CII.
- The annual membership subscription for Fellows and Associates who are granted a Chartered Insurer, Chartered Insurance Practitioner, Chartered Insurance Broker or Chartered Insurance Risk Manager title is payable at your next renewal. For details on fees please see [cii.co.uk/memberpricing](http://cii.co.uk/memberpricing)
- Five years professional experience must include at least three years employed full-time in the industry. For the purposes of this application, employment can include self-employment or working on a consultancy, contractual or voluntary basis provided the employment is full-time and is in the industry relevant to the Chartered title for which the person is applying. Professional experience for the remaining two years can include being a full time student where the primary focus of the study relates to the Chartered title for which the applicant wishes to apply.

## The Chartered Insurance Institute

CII Customer Service, 42-48 High Road, South Woodford, London E18 2JP  
Tel: +44 (0)20 8989 8464

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 @CIIGroup

[cii.co.uk](http://cii.co.uk)