



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Membership: How to guide

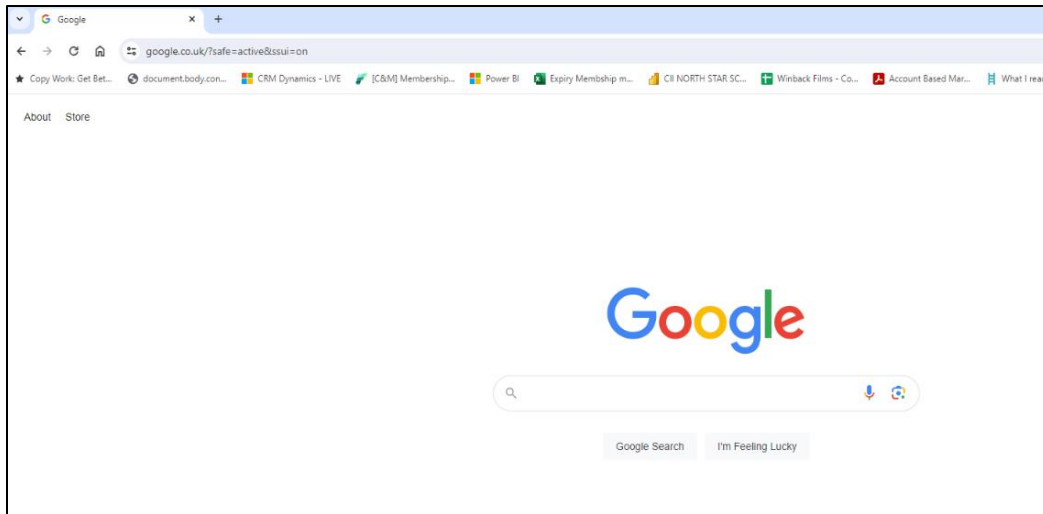
Upgrade to Chartered.

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.

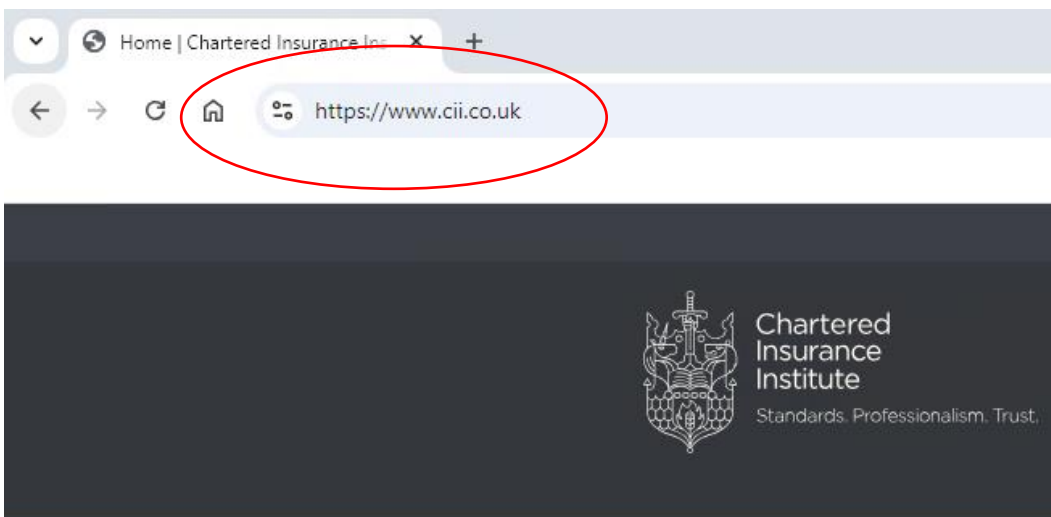
1. Begin by launching your preferred internet browser on your device.

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

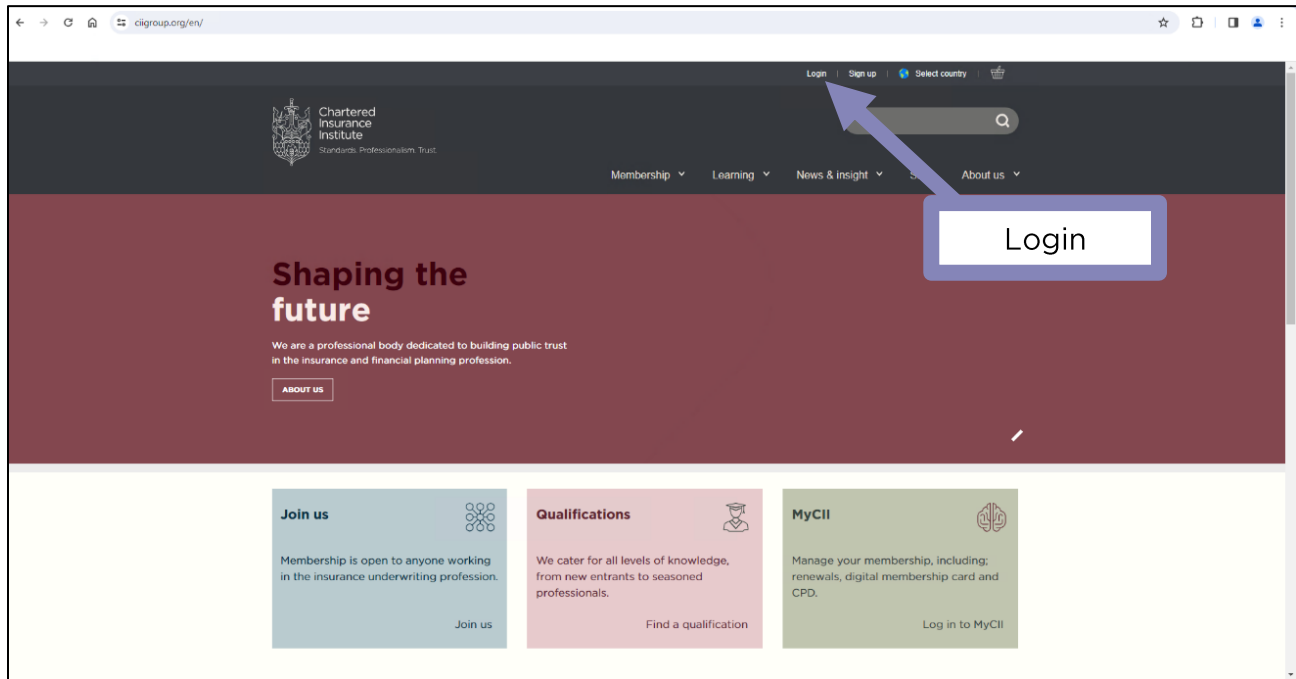


2. To access the Chartered Insurance Institute (My CII) website go to, <https://www.cii.co.uk/>

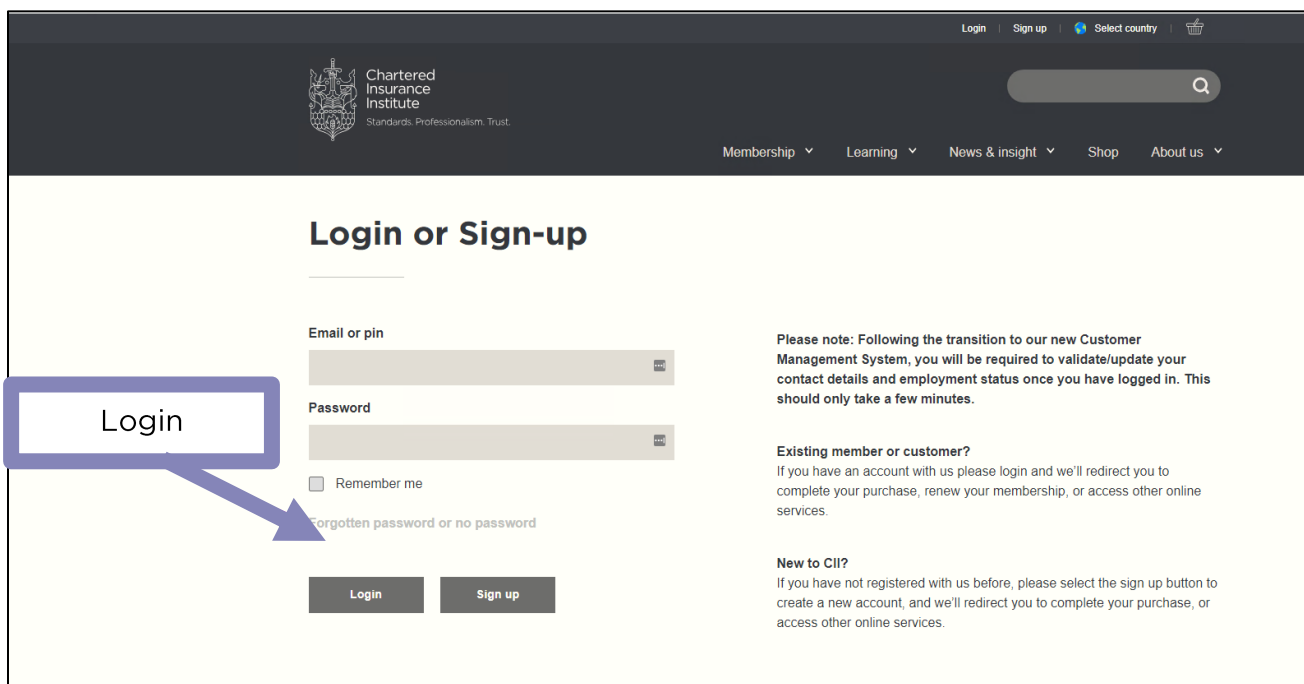
To access the Personal Finance Society (My PFS) website go to, www.thepfs.org



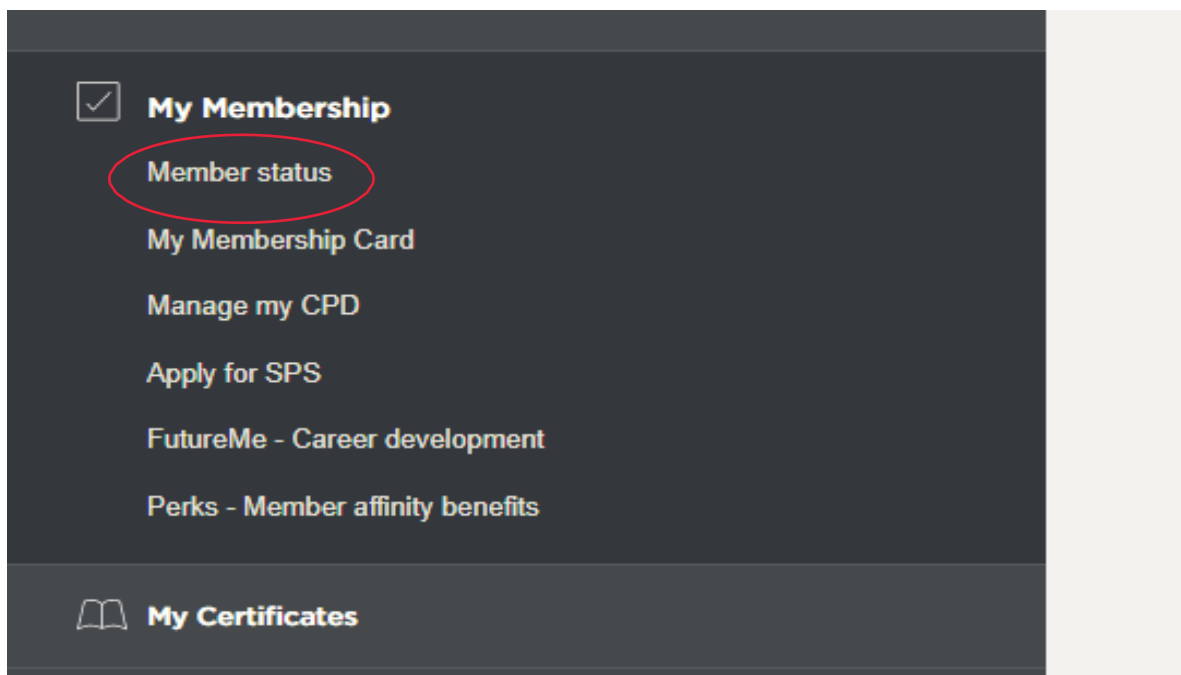
3. Once the webpage has loaded, select 'Login' on the top right-hand side.



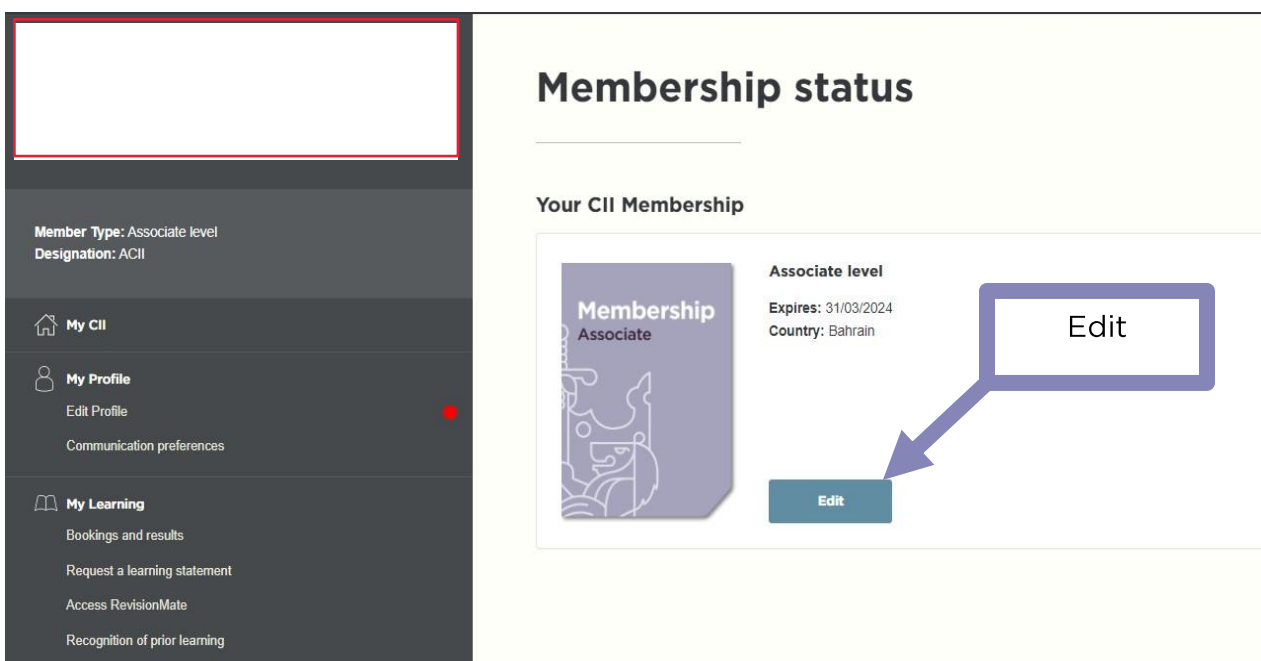
4. Log in using your PIN or email address and password. Your PIN number can be found in your welcome to membership email.



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. You can update these if you wish to, there is no cost unless joining the Local Insurance Institute of London (£3.00)

You will need to scroll to the bottom of this page and click 'continue'. If you are eligible for Chartered your chartered options will show on the next page.

Home > Membership > Join Us

Update your membership

Update your membership intro

Continue on with your journey to join, by selecting from the options below.

Offering an enhanced member experience, Societies are dedicated professional communities serving the needs of those in the major sectors of insurance and financial advice. Focusing on the issues that matter most, they offer a dedicated programme of CPD and good practice guidance. Joining a Society is a complimentary benefit of membership.

1 Select a Professional Community or Society

Chartered Insurance Institute

Your local institute

When you become a member of the Chartered Insurance Institute, or one of its related Societies in the UK, the Channel Islands and the Isle of Man, you also become a member of a Local Institute, usually close to where you live or work.

Use our search below to find your institute. For our international based customers, we suggest you select the 'International' Institute within the dropdown.

1 Select your local institute

Birmingham

Please note: The London Institute carries a surcharge of £3 per year.

Concession Membership Support

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

☐ Yes I am eligible for one of the support schemes

Continue

Useful Links

Membership

Benefits

Continue

8. A drop down menu of Chartered titles will appear on screen.

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

The screenshot shows a web interface titled "Chartered Title". Below the title is a section "Chartered Intro". Further down, there is a heading "Select a chartered title" followed by the text "I wish to apply to become". Below this is a dropdown menu with the placeholder text "Please select" and a downward arrow. To the right of the dropdown, the text "Associate membership" and "£210.00" are visible. On the right side of the page, there is a "Useful Links" section with sub-sections for "Membership" and "Benefits". A blue box with the word "Continue" is positioned over the "Continue" button at the bottom right of the main content area. A blue arrow points from this box to the "Continue" button.

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

The screenshot shows a web interface titled "Mandatory acknowledgements". Below the title, there are three checkboxes, each followed by a declaration:
1. ☐ 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
2. ☐ I confirm that I understand and will abide by the regulations for the use of the Chartered title
3. ☐ 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
To the right of the declarations, there is a blue box with the word "Continue". A blue arrow points from this box to the "Continue" button at the bottom right of the main content area.

Once ticked, click 'Continue'.

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, 'Continue'

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. Details of these obligations of membership can be found online at cii.co.uk/memberobligations

I confirm I have not:

1. Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure) or any judgment debt; or
2. 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 do not have to declare this; or
3. 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.

Please check the box below to confirm that you accept the declarations. You are required to tell us if you are made bankrupt, become the subject of an individual voluntary arrangement (or any such similar procedure), are convicted of any offence (other than a motoring offence with a monetary fixed penalty) or been subject to disciplinary action by the CII/PFS or any other professional and/or membership body or regulatory authority in the future.

If you are unable to tick the declaration box, you will not be able to apply online; please contact our Customer Services team for further information on how to submit an application: Tel: +44 (0)20 8989 8464, Email: contact@cii.co.uk

☐ I confirm that I accept the above declaration

Continue

Continue

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'.

Basket

Associate membership

- Local Institute: Birmingham
- Society: Chartered Insurance Institute
- Chartered Title: Chartered Insurer

Membership admission fee

£0.00

£0.00

Proceed

Summary

Subtotal	£0.00
Discount	£0.00
Shipping	£0.00
Tax	£0.00

Voucher Code

Apply

Order Total £0.00

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

NB: Your 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

Summary

Subtotal	£0.00
Discount	£0.00
Shipping	£0.00
Tax	£0.00

Order Total £0.00

Payment Method

Payment is not required, please click continue to complete your order.

Place order

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

Follow us on:



Customer Services
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