



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

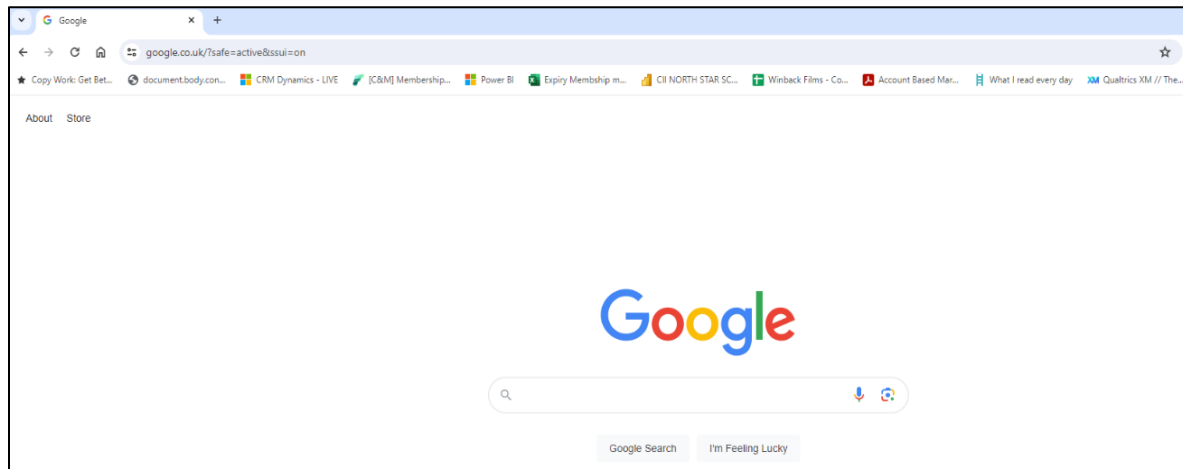
Membership: How to update your local institute

How to update your local institute through your CII/PFS dashboard.

This guide takes you through the steps to update your local institute through your CII/PFS member dashboard.

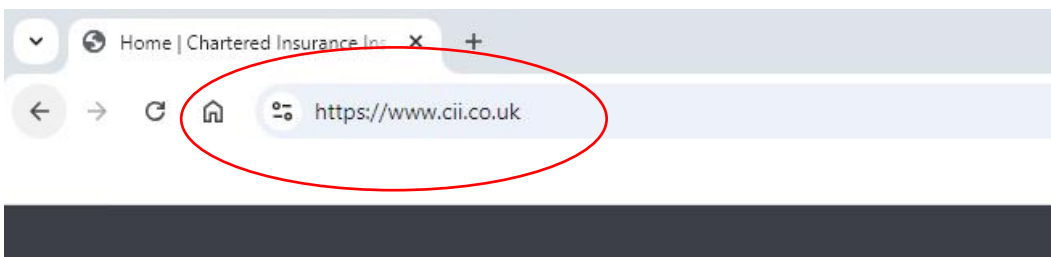
1. Begin by launching your preferred internet browser on your device.

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



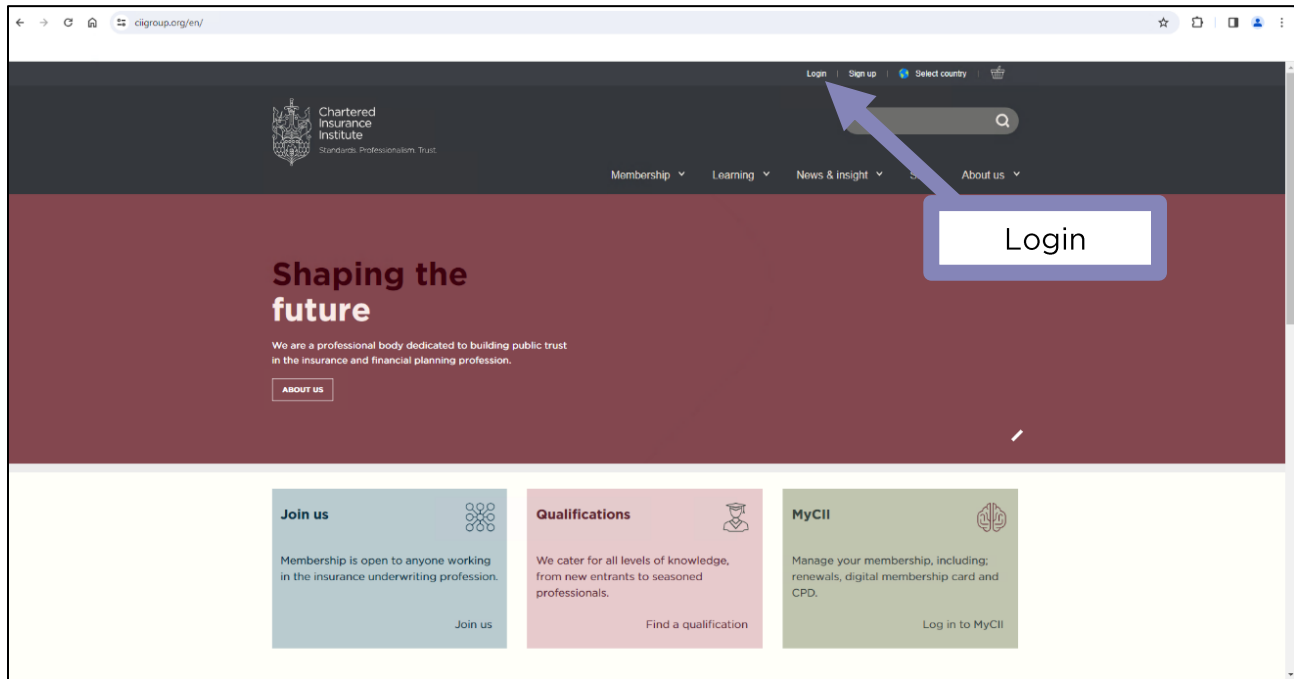
2. To access the Chartered Insurance Institute (My CII) website go to, www.cii.co.uk

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

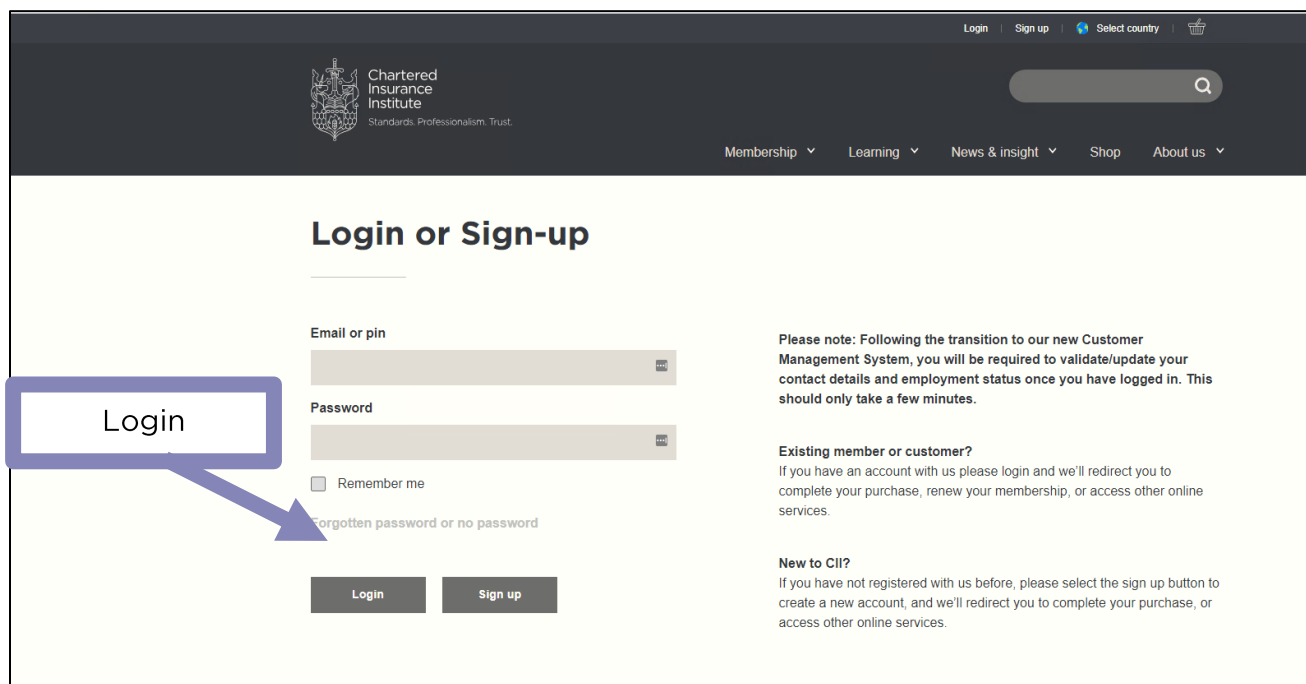


From this point on we will show you the process through the CII website, however the steps are the same for PFS members using the PFS website.

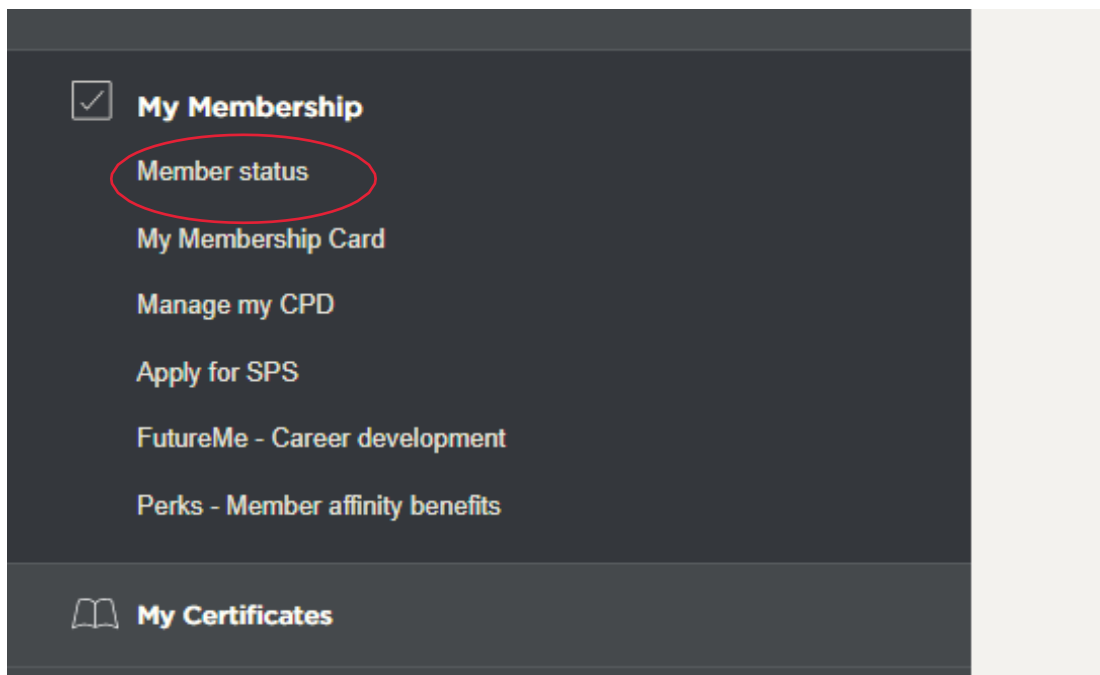
3. Once the webpage has loaded, select 'Login' on the top right-hand side.



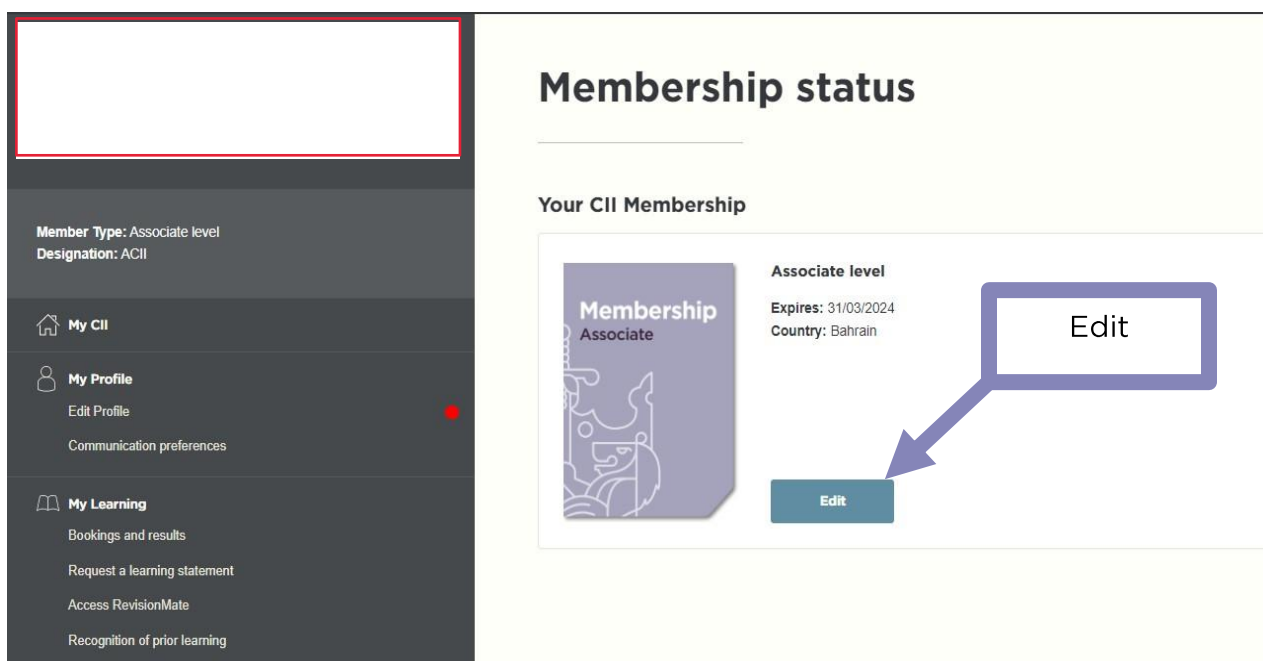
3. Log in using your PIN or email address and password.



5. To change your institute, 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 change, click the **'Edit'** button.



7. You should now see the 'Update your membership' page with your membership details.

[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

8. To change your local institute, scroll down to the section labelled 'Your local institute'.

Select your local institute from the drop-down menu.

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.

Select your local institute

Insurance Institute of Plymouth and Cx



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

Please note: The Local Insurance Institute of London has an additional £3.00 surcharge, to cover the cost of an additional annual publication available exclusively to its members.

9. Scroll to the bottom of the screen and click 'Continue'.

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

Continue

10. As part of the process, you will be asked to reconfirm you understand and accept the membership declaration.

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

Then 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 new local institute should now be shown in your basket, along with your current membership level. You may see an admission fee, but this should read as £0.00. You can ignore this fee.

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

Basket

Ordinary membership £0.00

- Local Institute: Insurance Institute of Plymouth and Cornwall
- Society: Broking Community

Membership admission fee £0.00

Proceed

Summary

Subtotal	£0.00
Discount	£0.00
Shipping	£0.00
Tax	£0.00
Order Total	£0.00

Voucher Code **Apply**

12. Click 'Place order' to confirm the change of institute.

Please allow up to 24 hours for the change to show on your My CII / My PFS.

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

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
Personal Finance Society
tel: +44 (0)20 8530 0852
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thepfs.org

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