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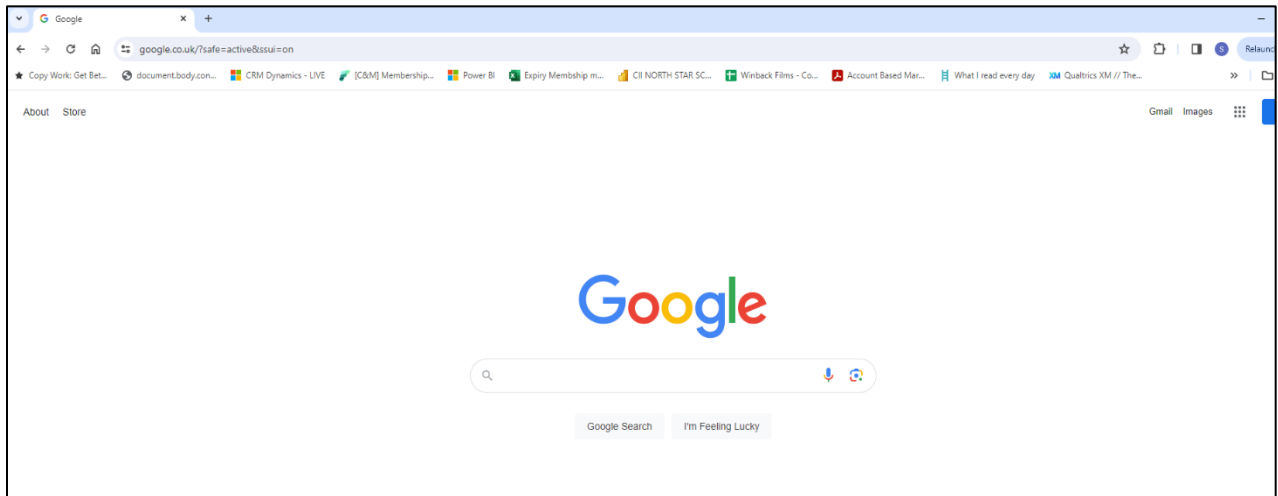
Membership: How to guide

Log in to the Member Dashboard for the first time.

How to login to the member dashboard for the first time.

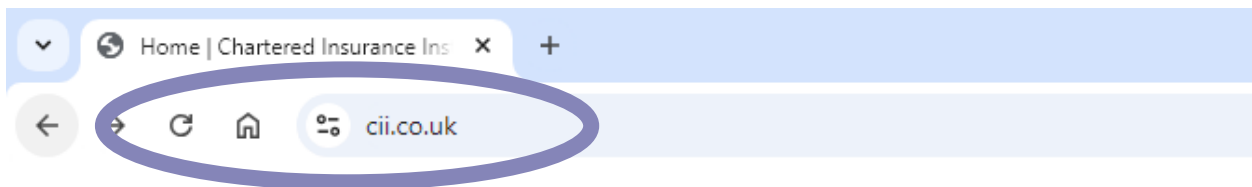
This guide explains how to log in to your Member dashboard for the first time. Once logged in you'll be able to access your membership details, examination bookings/results, certificates and more.

1. Begin by launching your preferred internet browser on your device.
Note: For optimal performance, we recommend using Google Chrome.



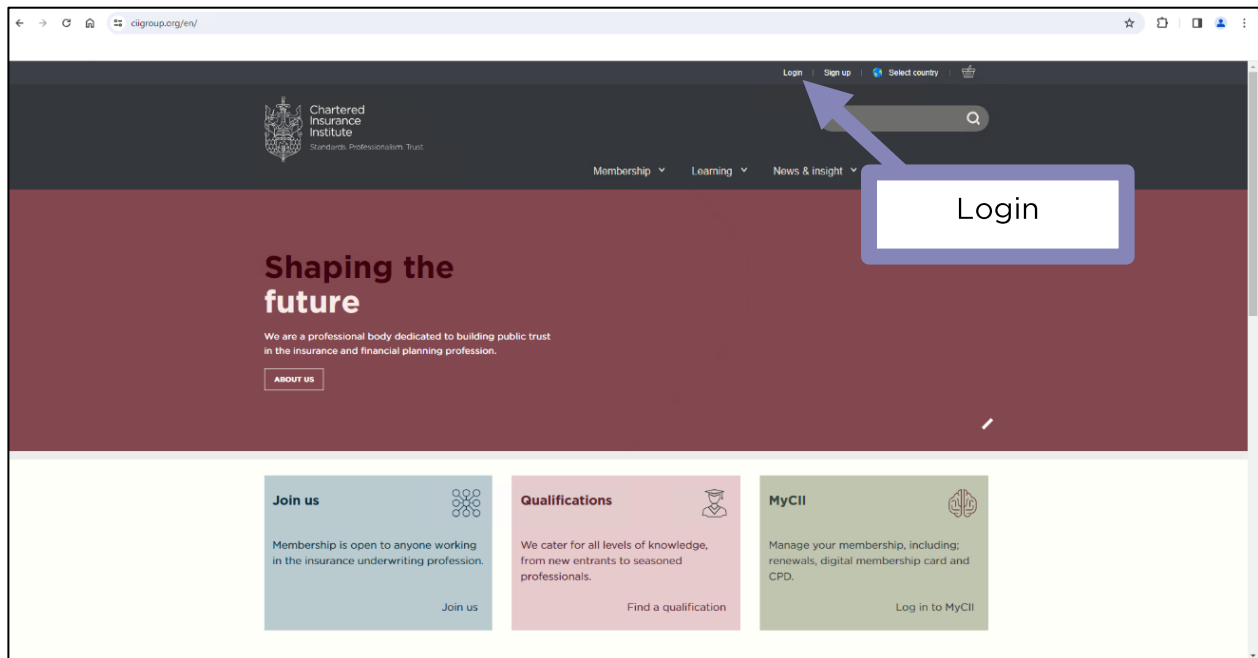
2. To access the Chartered Insurance Institute (My CII) website go to, <https://www.cii.co.uk/>

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



Please note: The process for accessing the Member Dashboard is the same for CII and PFS members. We will now show you the steps you should take to update your details on the CII website. The same steps can be followed on the PFS website.

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



4. Log in using your PIN or email address and password. Your PIN number can be found in your welcome to membership email. If you have not received a welcome email, please contact our customer services team at customer.serv@cii.co.uk

If you have forgotten your password or do not have one, continue to step 5.

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Login or Sign-up

Email or pin

Password

☐ Remember me

[Forgotten password or no password](#)

Login **Sign up**

Please note: Following the transition to our new Customer Management System, you will be required to validate/update your contact details and employment status once you have logged in. This should only take a few minutes.

Existing member or customer?
If you have an account with us please login and we'll redirect you to complete your purchase, renew your membership, or access other online services.

New to CII?
If you have not registered with us before, please select the sign up button to create a new account, and we'll redirect you to complete your purchase, or access other online services.

5. If this is your first-time logging in to the website you will need to set up a password. You can do this by clicking the 'Forgotten password or no password' link at the bottom of the Login section.

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Login or Sign-up

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☐ Remember me

[Forgotten password or no password](#)

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New to CII?
If you have not registered with us before, please select the sign up button to create a new account, and we'll redirect you to complete your purchase, or access other online services.

6. You should now see the screen below. Please enter and confirm your email address and click 'Submit'. You will receive an email with a verification link.

Click the link in the email and follow the steps to set up a password.



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Forgotten your password?

If you are a returning customer and you have forgotten your password, simply enter your registered email address below.

We will send an email to this address with your **PIN** and a verification link back to our web site.

Email address:*

Confirm email:*

Submit

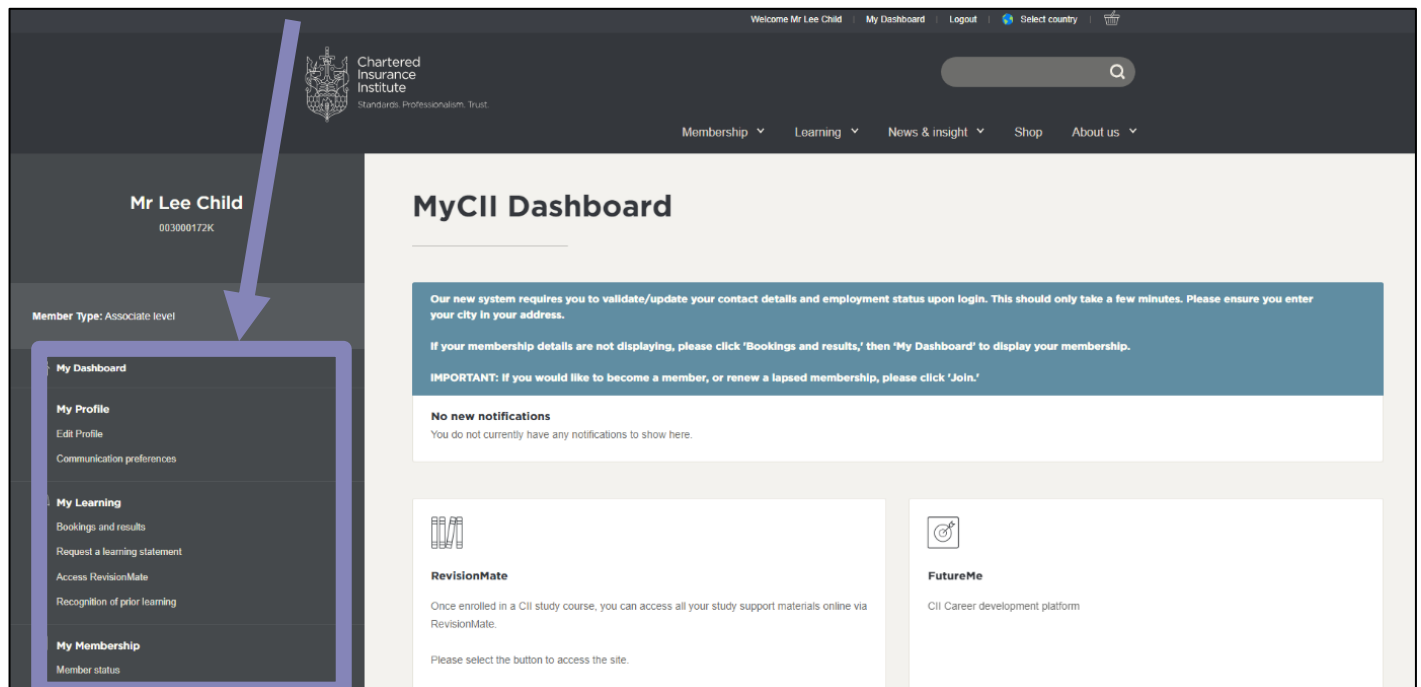
6. Once you've set up a password, log in to the website using your PIN/email and password. You should be directed to the Member Dashboard.

The Member Dashboard

The Member Dashboard provides quick access to a range of key features and member-exclusive benefits. Here are some of the things you can do from the Member Dashboard:

- Update your personal details including your email and address.
- Select your communication preferences.
- Edit your membership details including your Local Institute and Community
- View your exam bookings and results.
- Access Perks – our affinity benefits scheme
- Log in to FutureMe – our member exclusive learning and development platform.

Please use the links on the left hand-side of your screen to navigate the member area.



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.

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ciigroup.org

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