

# **Enrolment for the Fellowship Programme**

#### Important notes:

Please complete all sections of this form in BLOCK CAPITALS. If you require any assistance or advice when completing this form please contact Customer Service or email

societies.fas@cii.co.uk

Once completed and payment has been made, please email the form to: societies.fas@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.)				
Please give your Cl	I/PFS permanent identity number if known (PIN)				
Mr/Mrs/Miss/ Ms/Other	Surname/ Family name				
Forename/ Given name(s)					
Preferred name					
(Please enter the nam	ne you would like to be addressed by for all correspondence)				
Gender	(Please tick) Male Female Prefer not to say Other				
Employer's name					
Tel					
Work address					
Postcode					
Home address					
Postcode					
Mandatory - ple	ase 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					

### Section B - Fees and method of payment

Enrolment fee and BEP	£342.00	£
Re-enrolment fee only*	£237.00	£

\*Only select this option if you have previously successfully completed the BEP.

Tick here if you have already completed the BEP and are only paying the re-enrolment fee.

To comply with the latest Payment Card Industry Data Security Standards (PCI DSS), the CII no longer accepts credit and debit card as a payment method for paper applications.
If you would like to receive a payment receipt, please tick the below box.
Email
(If selecting email be sure to provide your email address on the first page of the form)
Make sure you have signed and dated the declarations, and ticked a payment method.
The method of payment is a bank transfer via Bacs.
Please use the CII account details below and include the required information.
CII account details: HSBC Bank plc, 60 Queen Victoria Street, London EC4N 4TR UK
Account number: 90114758 Sort code: 40-11-60 BIC: HBUKGB4B IBAN: GB59HBUK40116090114758
Please include the following information so that we can identify your payment:
Date of submission Amount in sterling transferred £
Transaction reference number (if applicable)

## How to place your order:

• Payment by Bacs – once your payment has been made please email all pages of this completed application form, together with your remittance advice, to societies.fas@cii.co.uk

Important note: transfers can take up to two weeks to process, therefore please ensure that you submit this in sufficient time to meet

• Payment by Card – contact the Customer Services team directly, via their telephone service on +44 (0)20 8989 8464, which is available Mon to Fri: 9am - 5pm (GMT). Once payment has been taken please email this completed application form to societies.fas@cii.co.uk

#### **Important Note:**

Only send your completed Enrolment Application form to us once payment has been completed. We will not be able to process enrolments until payment has been received.

any relevant closing dates. You must include any bank charges in the transfer.

#### Section C - Declarations

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#### 8U/Udfch/Widcb UbX df ii UMh

H\Y'7=ik]```Ybgi fY'h\Unnti f'dYfgcbU``XUHJ']g'dfcWggYX']b``]bY'k]h\`8UHJ'DfchYM]cb``Y[]g`Uh]cb'UbX'h\Y'7=i8UHJ'DfchYM]cb'UbX' Df]j UMnGHJnYa Ybh'fluj U]`UV'Y'Unik k k 'V]]'Wd'i \_#XUHJdfchYM]cb\L'' To process this application, I consent to the CII processing my data.

I gY'h\Y'7=ik YVgj|h''hc'i dXUh'nti f'WbhUMiXYhUj`g'UbX'dfYZYfYbWgžgY`YWljb['h\Y'htdYg'cZ]bZcfa Uhjcb'UbX'gYfj]Wg'nti 'k]g\'hc'fYWj`Y'UbX'hc'cdhi]b'cf'ci hcZa Uj`]b[g'www.cii.co.uk/mycii

Please note: ]Znci 'WccgY'bchhc'fYW]j Y'a U[-Yh]b[ 'Ya U]'gžnci 'k ]``'gh]``fYW]j Y'hfUbgWh]cbU'Wa a i b]Wh]cbgfY'Uh]b[ 'hc'nci f' a Ya VYfg\]džei U]Z]Wh]cbgžYj YbhVcc\_]b[ g'UbX'j ch]b[ 'f][ \hgž'Ug'k Y``'Ug']a dcffUbhcdYfUh]cbU'bch]Z]Wh]cbgfY'Uh]b[ 'hc'h\Y'7="' K \YfY'Udd']WVYžnci 'Wb WccgY'hc'fYW]j Y'h\YgY'VmdcghVm'`c[ [ ]b[ ']b'hc'www.cii.co.uk/mycii UbX'i dXUh]b[ 'nci f' dfYZ/fYbWd'

#### **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.

#### **Plagiarism**

In submitting work under the Fellowship programme you are declaring that you have read the Fellowship guidelines and that it is your own work.

Failure to comply with these rules may result in disciplinary action and your name being published in our Journal and Personal Finance Professional magazines and on our website.

#### 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** 

	]	
Signature	Date	

# Section D - Fellowship plan

Please refer to the Fellowship regulations and guidelines when completing your plan. Please complete this form and keep a copy for your reference.

Objectives set to	reach Fellowship:	Target	Actual
Date enrolled on	Fellowship scheme		
Intended date of	submission of BEP for assessment		
Intended date of	completion of major achievement		
Intended date of	completion of Statement of Personal Development		
Intended date of application for election to Fellowship			
State how you have	ve tried to ensure that your personal objectives in reaching Fe	ellowship also meet with tho	se of your employer:
Section E -	Major achievement chosen to support	election to Fellow	ship
Please indicate wl	hich option you intend to put forward as your major achiever	nent.	
Dissertation*	Project* Published work*	Qualification†	
	submit an alternative qualification as your major achievemen plication form and supporting documentation with this plan. k/fellowship.		
* If you intend to	submit a dissertation, project or portfolio of published work	as your major achievement,	please complete the following
Title			
Brief description of content			
or content			
Please note:			
	omission contains any company-specific information you shou	uld obtain an endorsement (	of your intended
*	nent from your employer.		
	our major achievement you are agreeing, where this is succes	sstully accepted towards Fe	llowsnip, for the
Cir to make this	s available for public view.		
Signature	Date		
Signature	Date		