



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**

Address to be used for postal correspondence (Please tick) ☐ Home ☐ Work

Section B – Fees and method of payment

Enrolment fee and BEP	£335.00	£
Re-enrolment fee only*	£232.00	£

*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) PIN

Important note: transfers can take up to two weeks to process, therefore please ensure that you submit this in sufficient time to meet any relevant closing dates. You must include any bank charges in the transfer.

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
- **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.

Section C – Declarations

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Dfj] U]hGhY`a Ybh]Uj U]UV`Y`Uhk k k`V]V`1`_#XUHU'dfchW]cb` To process this application, I consent to the CII processing
my data.

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K`Y`fY`Udd`j]W`V`Y`znci`W`b`W`ccgy`h`c`fYVW] Y`h`Yg`V`m`dcgh`V`m`c[[]b[]b`h`c`www.cii.co.uk/mycii UbX`i`dXU]b[`nci`f`
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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 tried to ensure that your personal objectives in reaching Fellowship also meet with those of your employer:

Section E – Major achievement chosen to support election to Fellowship

Please indicate which option you intend to put forward as your major achievement.

Dissertation*☐

Project*☐

Published work*☐

Qualification†☐

† If you intend to submit an alternative qualification as your major achievement, please attach a completed copy of the major achievement application form and supporting documentation with this plan. This application form can be found on the CII website cii.co.uk/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

Please note:

- That if your submission contains any company-specific information you should obtain an endorsement of your intended major achievement from your employer.
- In submitting your major achievement you are agreeing, where this is successfully accepted towards Fellowship, for the CII to make this available for public view.

Signature

Date