



Chartered  
Insurance  
Institute  
Standards. Professionalism. Trust.

# Election to Fellowship

## Important notes:

Before completing this application form, carefully read the Fellowship guidelines.

Please type or write legibly in black or blue ink. If there is insufficient space in any part of this form, please attach extra sheets.

Once you have completed all sections of this form in BLOCK CAPITALS and payment has been made, please email to:  
**[societies.fas@cii.co.uk](mailto:societies.fas@cii.co.uk)**

If you require any assistance or advice when completing this form please email **[societies.fas@cii.co.uk](mailto:societies.fas@cii.co.uk)**

## Section A – Personal details

(Please complete all fields – it is essential we have your email address as this is our main channel of contact with you)

Please give your CII/PFS permanent identity number (PIN) if known

PIN

Mr/Mrs/Miss/  Surname/  
Ms/Other  Family name

Forenames/  
Given name(s)

Preferred name for  
CII communications

Gender (Please tick) ☐ Male ☐ Female ☐ Prefer not to say Date of birth

Daytime tel  Mobile

Employer name

Job title

Work address

Postcode  Country

Home address

Postcode  Country

email

Please take care when providing your email address as most correspondence will be sent electronically.

Tick address to be used for correspondence (Please tick) ☐ Home ☐ Work

Please set out below your major achievement. You must choose only **one** of the four options:

[illegible]

(If no, please email a certified copy of your qualifications certificate to [societies.fas@cii.co.uk](mailto:societies.fas@cii.co.uk))

Title

[illegible]

Title																Date of publication					
Title																Date of publication					
Title																Date of publication					

[illegible]

Signature \_\_\_\_\_ Date \_\_\_\_\_

Section D – Election to Fellowship personal checklist

Please do not submit your application until you can confirm by ticking all the 'yes' boxes below that are applicable to you, to indicate that you have met the election to Fellowship application criteria.

I confirm that I:	Yes	For office use only
• am an Associate of the Chartered Insurance Institute	<input type="checkbox"/>	<input type="checkbox"/>
• hold the pre-1992 Associateship and have submitted a summary of 10 years relevant work experience	<input type="checkbox"/>	<input type="checkbox"/>
• am a current member of the Chartered Insurance Institute	<input type="checkbox"/>	<input type="checkbox"/>
• have been employed (or self-employed) in the insurance industry for at least four years	<input type="checkbox"/>	<input type="checkbox"/>
• am wholly or mainly engaged or employed in work connected with insurance	<input type="checkbox"/>	<input type="checkbox"/>
• have paid the Fellowship enrolment fee	<input type="checkbox"/>	<input type="checkbox"/>
• have successfully completed a Fellowship plan	<input type="checkbox"/>	<input type="checkbox"/>
• have attached a copy of my updated Fellowship plan (Please review Section D of your enrolment application)	<input type="checkbox"/>	<input type="checkbox"/>
• have successfully completed the Business Ethics Programme	<input type="checkbox"/>	<input type="checkbox"/>
• have three years of CPD records (You must have written confirmation from the CII that your records have been approved.)	<input type="checkbox"/>	<input type="checkbox"/>
• have completed the application for Chartered title/am a Chartered title holder	<input type="checkbox"/>	<input type="checkbox"/>
• have signed the declarations (Section F)	<input type="checkbox"/>	<input type="checkbox"/>

By ticking the appropriate boxes you are confirming that you have enclosed all the necessary evidence to support your application. You must include everything listed in part A and one of the options from part B.

Please do not submit your application until you are able to enclose all the supporting documentation.

<b>Part A.</b> I confirm that I have enclosed all of the following:		
• a completed and signed application form	<input type="checkbox"/>	<input type="checkbox"/>
• an election fee of £237 (Section E)	<input type="checkbox"/>	<input type="checkbox"/>
• a copy of my statement of personal development (Please check the Fellowship guidelines to ensure that your statement includes all relevant information.)	<input type="checkbox"/>	<input type="checkbox"/>

<b>Part B.</b> I confirm that I have enclosed one of the following major achievements:		
• evidence of a further professional or managerial qualification (Please refer to the Fellowship regulations or letter of confirmation)	<input type="checkbox"/>	<input type="checkbox"/>
• a copy of my project(s) (with a signed employer's endorsement if required) (Section C)	<input type="checkbox"/>	<input type="checkbox"/>
• a copy of my dissertation (with a signed employer's endorsement if required) (Section C)	<input type="checkbox"/>	<input type="checkbox"/>
• my portfolio of published work containing a copy of each publication	<input type="checkbox"/>	<input type="checkbox"/>

You must have successfully completed the Business Ethics Programme before applying for election to Fellowship.

## Section E – Method of payment (Bacs only)

**Fees** – I enclose the payment of £237 election 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 via email, please tick the below box.

☐

(Be sure to provide your email address on the first page of the form)

Make sure you have signed and dated the declarations

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 Election Application form to us once payment has been completed.

We will not be able to process elections until payment has been received.

## Section F – Declarations

I declare that all information provided by me on this form is true and correct to the best of my knowledge.

### Data Protection and Privacy

The CII will ensure that your personal data is processed in line with Data Protection legislation and the CII Data Protection and Privacy Statement (available at [www.cii.co.uk/dataprotection](http://www.cii.co.uk/dataprotection)). **To process this application, I am deemed to have consented to the CII processing my data.**

### 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**

To opt out of postal marketing communications from the CII and your local institute please send a request to Customer Service at **customer.serv@cii.co.uk**

Signature

Date