

# **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

If you require any assistance or advice when completing this form please email **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 Complete all fle	eras – it is essential we have your email address as this is our main channel of co	nitact v	with you)	
Please give your CII/I	PFS permanent identity number (PIN) if known	PIN		
Mr/Mrs/Miss/ Ms/Other	Surname/ 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 Mobile			
Employer name				
Job title				
Work address				
Postcode				
Home address				
Postcode	Country Country			
email				
Diagraphalia agraphia		III		
Please take care when	n providing your email address as most correspondence will be sent electronica	iiy.		
Tick address to be us	sed for correspondence (Please tick) Home Work			

## Please set out below your major achievement. You must choose only **one** of the four options: 1. Professional or managerial qualification gained since becoming an Associate. Has this been approved by the CII? (Please tick) Yes Nο (If no, please email a certified copy of your qualifications certificate to societies.fas@cii.co.uk) 2. Dissertation (Please email a copy with this application to societies.fas@cii.co.uk) Title 3. Project(s) (Please email a copy of each project report with this application to societies.fas@cii.co.uk) Title Title Title 4. Portfolio of published works (Please email a copy of each published work (in English) with this application together with a written summary to societies.fas@cii.co.uk) Title Date of publication Title Date of publication Title Date of publication Section C - Endorsement by employer If a work-based project report or dissertation is to be submitted, please ask your employer to endorse your application as follows: We support the above named person's choice of work-based major achievement and confirm that we have no objection to the publication of the company-specific information that is included. Name Title

Date

**Section B - Major achievement** 

Signature

## 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.

со	nfirm that I:	Yes	For office use only
•	am an Associate of the Chartered Insurance Institute		
•	hold the pre-1992 Associateship and have submitted a summary of 10 years relevant work experience		
•	am a current member of the Chartered Insurance Institute		
•	have been employed (or self-employed) in the insurance industry for at least four years		
•	am wholly or mainly engaged or employed in work connected with insurance		
•	have paid the Fellowship enrolment fee		
	have successfully completed a Fellowship plan		
•	have attached a copy of my updated Fellowship plan (Please review Section D of your enrolment application)		
•	have successfully completed the Business Ethics Programme		
•	have three years of CPD records (You must have written confirmation from the CII that your records have been approved.)		
•	have completed the application for Chartered title/am a Chartered title holder		
•	have signed the declarations (Section F)		
evid	cicking the appropriate boxes you are confirming that you have enclosed all the necessary dence to support your application. You must include everything listed in part A and one of the ions from part B.		
Plea	se do not submit your application until you are able to enclose all the supporting documentation.		
art •	<b>A.</b> I confirm that I have enclosed all of the following: a completed and signed application form		
•	an election fee of £232 (Section E)		
•	a copy of my statement of personal development		
	(Please check the Fellowship guidelines to ensure that your statement includes all relevant		
Part	information.) <b>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)		
•	a copy of my project(s) (with a signed employer's endorsement if required) (Section C)		
•	a copy of my dissertation (with a signed employer's endorsement if required) (Section C)		
•	my portfolio of published work containing a copy of each publication		

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

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

The method of payment is a bank transfer via Bacs. Fees - I enclose the payment of £232 election fee. To comply with the latest Payment Card Industry Data Security Please use the CII account details below and include the required Standards (PCI DSS), the CII no longer accepts credit and debit information. card as a payment method for paper applications. CII account details: If you would like to receive a payment receipt via email, please tick the below box. HSBC Bank plc, 60 Queen Victoria Street, London, EC4N 4TR UK Account number: 90114758 **Sort code:** 40–11–60 (Be sure to provide your email address on the first page of the form) **BIC: HBUKGB4B** Make sure you have signed and dated the declarations IBAN: GB59HBUK40116090114758 Please include the following information so that we can identify your payment: Amount in sterling transferred £ Date of submission DIN Transaction reference number (if applicable) 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 Application for study materials** The CII will ensure that your personal data is processed in line with Data I undertake to use them for my own purposes and not to sell, copy, lend or Protection legislation and the CII Data Protection and Privacy Statement give them to anyone else. (available on the CII's website). To process this application, I am deemed to **Plagiarism** have consented to the CII processing my data. In submitting work under the Fellowship programme you are declaring that Sharing information with your employer you have read the Fellowship guidelines and that it is your own work. Failure The CII will, upon request from your employer, provide it with details of to comply with these rules may result in disciplinary action and your name being published in our Journal and Personal Finance Professional magazines your assessment record and accreditation including all attempts and future entries, along with your CII permanent identity number. If you DO NOT and on our website wish for us to provide these details to your employer, please tick the Your right to cancel following box. In accordance with The Consumer Contracts (Information, Cancellation Privacy and electronic communications regulations and Additional Charges) Regulations 2013 you have a right of cancellation The CII may from time to time wish to draw your attention to other CII in respect of these Products and Services, which right shall (subject to the products and services electronically which are likely to be of interest to you. Regulations) expire fourteen calendar days from the day on which either If you DO NOT consent to the CII using your data in this way, please tick the the product/s are received by you, or a person nominated to receive the following box. products on your behalf, or your order for services is accepted by the CII. Should you wish to cancel, notice should be sent to Customer Service. Sharing your data with local institutes Where products have been supplied to you prior to such cancellation they The CII will share your data with your local institute (UK, Channel Islands must be returned to us, in the condition in which they were supplied to you, and Isle of Man based members only) so they may communicate to you, at your expense. Reimbursement for any monies paid by you which relate electronically, any local events, products and services that complement to the cancellation will be sent to you within fourteen days of receiving the those offered by the CII. If you DO NOT consent to the CII using your data notice of cancellation or if products are to be returned to us, within fourteen in this way, please tick the following box. days of their receipt or proof of sending. 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 in Chartered Insurance Institute

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