



Chartered  
Insurance  
Institute

Affiliated

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# A smooth journey to becoming an Affiliated Institute

The guidance for completing the application



# Completing the application:

This document provides a step by step guide to completing your application for Affiliated Institute status.

If you need any further assistance or have any questions please contact our international team on **0208 530 0824** or at **internationalpartnerships@cii.co.uk**

If you require this information in a different format or need assistance completing the application, please contact us.

## The process consists of five main steps:



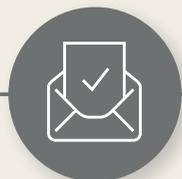
### Step 1

Check your organisation is eligible



### Step 2

Complete the application form



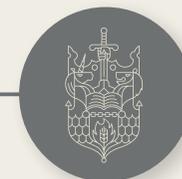
### Step 3

Submit your application



### Step 4

Await the outcome of your submission



### Step 5

Use and promote your organisation's Affiliated Institute status

## Completing the application - continued



### Step 1: Check your organisation is eligible

**There are several eligibility criteria that your organisation needs to meet in order to become a CII Affiliated Institute. These are as follows::**

1. Your organisation must have a vision or mission statement which aligns with that of the CII. This is typically one or two sentences outlining the intent of your organisation and what it is designed to achieve. The CII's vision can be accessed at the following link [www.cii.co.uk/media/7303038/your\\_cii\\_strategic\\_manifesto.pdf](http://www.cii.co.uk/media/7303038/your_cii_strategic_manifesto.pdf)
2. Your organisation must be not-for-profit. Many different types of organisations fit into this category but this would typically exclude private companies who are profit driven.
3. Your organisation must be either an awarding body and/or a professional membership body and/or provide educational services. This essentially ensures that your organisation is sufficiently aligned to the work of the CII to become an Affiliated Institute.
4. Your organisation must have the appropriate sector focus in order to become an Affiliated Institute with the CII. This means that it must be active in either general insurance, life and protection insurance or financial advice.
5. The organisation must be able to commit to working with the CII and other Affiliated Institutes to support the profession. From time to time, we may request your assistance with an initiative we looking to run in your region or on other projects where your knowledgeable insight would be of benefit.
6. In order to become a CII Affiliated Institute, your organisation must be able to demonstrate that it offers an appropriate programme of activity relative to the size of your market.
7. Your organisation must be able to declare that nothing about the organisation or its officers would create a reputational risk to the CII in being granted Affiliated Institute status.



### Step 2: Complete the application form

Once you have confirmed that your firm is eligible to apply for Affiliated Institute status, the next stage is to complete the application form. This is split into two sections:

- **Section 1 – Your corporate details**  
This section is all about your firm. We ask for details such as name, office address and contact details.  
  
You are also asked who will be your Responsible Individual. The Responsible Individual's role is to be the primary contact for matters between the organisation and the CII. We also need a secondary contact and this should be someone we can contact if the Responsible Individual is unavailable.
- **Section 2 – Eligibility criteria**  
In this section, you need to tick a box next to each of the aforementioned 7 eligibility criteria and another box regarding the terms and conditions. This is to confirm that your organisation meets these requirements and that you agree to the terms and conditions.

## Completing the application - continued



### Step 3: Submit your application

When you have answered 'yes' to all the questions in the box below, you can submit your application form at [internationalpartnerships@cii.co.uk](mailto:internationalpartnerships@cii.co.uk)

- Does your organisation meet all the criteria outlined?
- Are you happy with the terms and conditions? and
- Have you completed the application form fully?



### Step 4: Await the outcome of your submission

All applications go through a very thorough approval process, including requiring approval from the CII's Executive Management Team and the CII Board. Therefore approval can take up to 13 weeks from the date of submission.



### Step 5: Use and promote your Affiliated Institute status

For more information on Affiliated Institute status and if you have any queries once your application has been successful, please email your query to [internationalpartnerships@cii.co.uk](mailto:internationalpartnerships@cii.co.uk)

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