Welcome to our world!



Discover the value of membership for free.

Join for free

If you're serious about a career in risk or wealth management, you need to get to know the sector and the people as soon as possible.

Joining the Chartered Insurance Institute (CII) or Personal Finance Society (PFS) gives you the advantage of inside knowledge and connections to improve your chances of landing your first placement or job.

Get your career off the ground

Membership will give you access to a range of valuable career support services, all designed to kick-start your career in risk or wealth management.

Big benefits are yours for free:

- Member-only online access to sector reports, research and publications
- Access to technical and social networking events
- Job alerts delivered to your inbox

As a member you'll also be eligible for our Perks discounts scheme. It gets you big savings on restaurants and high street shops, as well as cinemas, fitness and holidays.

We look forward to welcoming you to our network of 125,000 members. For the first time, you will be able to join the Society of Mortgage Professionals (SMP).

Simply complete the application form and hand it back today or email your scanned form to discover@cii.co.uk





Section A - Personal details

Reference: (CII use only)	

Joining criteria

Free Discover membership of the Chartered Insurance Institute or Personal Finance Society is open to school, college and university students who:

- are not in full-time employment:
- do not hold a CII qualification; and
- are not studying for a CII qualification.

Note: You must complete this form in full.

Alternative

Free Discover membership scheme

(Please complete al	ll fields)																												
Mr/Mrs/Miss/ Ms/Other						F		name, y nar																					
Forename/ Given name(s)																										L			
Preferred name																													
(Please enter the name	e you wo	uld like	e to b	e add	Iresse	ed by f	or all	corre	spo	nder	nce)				Date	e of	Birt	h (y	ou r	nus	t be	16	or o	der))				
Gender ((Please ti	ick)	M	1ale		Fen	nale		Pre	efer	not	to s	say				Oth	er											
Mandatory - pleas	se take c	are to	ente	er thi	s cor	rectly	/ as v	ve wi	ll be	e un	able	e to	pro	cess	you	ır ap	plic	atio	n w	itho	ut a	val	id e	mail	ado	lress	j.		
Primary email																													
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Home address																													
Postcode									C	oun	try																		
Alternative address																													
Postcode									Co	oun	try																		

Address to be used for postal correspondence and local CII institute/PFS region allocation (Please see note 1)

Section A - Personal details continued
Name of school/ collage/university
Date of leaving school/Graduation M M Y Y Y Y Y
Section B - Which membership body is right for me?
Please tick one of the below to select which membership body you wish to join:
The Chartered Insurance Institute
The Personal Finance Society
Section C - Choose a faculty
Please select a faculty you would like to join. These provide access to sector or discipline specific career support information. See note 2 overleaf for our list of faculties.

Section D - Declarations

Please complete this section in full

I am applying to be a student member of the CII/PFS as part of the Discover membership scheme. I confirm that I am a resident of the United Kingdom; I hold no CII qualifications and I have never passed any CII examinations. I note that, if my application is accepted, as a student member of the CII/PFS, I will not be entitled to vote at General Meetings of the CII/PFS.

For CII members only

The CII is a professional body dedicated to building public trust in the insurance and financial planning professions. Suitability for membership is assessed based on completion of the below declarations. This is part of our commitment to high professional standards. In applying to be a student member of the CII, I agree to be immediately bound by: the CII's Charter; Bye-laws; Code of Ethics; rules and regulations and requirements of membership. I also agree to be bound by the constitution and bye-laws of any local institute of which I become a member. Full details of these obligations of membership can be found online at cii.co.uk/memberobligations

For Personal Finance Society members only

In applying to become a member of the PFS, I agree to be immediately bound by the PFS Articles of Association and Bye-laws. PFS members automatically become members of the Chartered Insurance Institute (CII). The CII is a professional body dedicated to building public trust in the insurance and financial planning professions. Suitability for membership is assessed based on completion of the below declarations. This is part of our commitment to high professional standards.

I therefore also agree to be immediately bound by the CII's Charter, Code of Ethics, rules, regulations and requirements of membership. I also agree to be bound by the constitution and bye-laws of any local institute of which I become a member. Full details of these obligations of membership can be found online at thepfs.org/memberobligations

Please tick the relevant box to confirm whether you have:

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Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure) or any judgment debt.	☐ Yes	□No
Been subject to an adverse judgment of any court (or been charged but not yet tried with) any criminal offence other than a monetary fixed penalty for a motoring offence. Please note, if the conviction is considered spent under the Rehabilitation of Offenders Act you should select 'No'.	☐ Yes	□No
Been subject to any disciplinary sanctions (or are currently the subject of any investigation) by the CII/PFS or any other professional and/or membership	☐ Yes	□No

If you have answered 'yes' to any of these questions, please also provide any relevant details on a separate sheet of paper.

body or regulatory authority.

Please note that whilst a member of the CII, you are required to let us know if and when, at any point in the future, your circumstances are such that you would have to answer 'yes' to any of the above.

Section D - Declarations continued

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 cii.co.uk/dataprotection). To process this application. I consent to the CII processing my data.

Use the CII website to update your contact details and preferences, selecting the types of information and services you wish to receive and to opt in or out of mailings: cii.co.uk/mycii

Please note: if you choose not to receive marketing emails, you will still receive transactional communications relating to your membership, qualifications, event bookings and voting rights, as well as important operational notifications relating to the CII. Where applicable, you can choose to receive these by post by logging in to cii.co.uk/mycii and updating your preferences.

Privacy and electronic communications regulations

In order to keep you informed in a timely and cost-effective manner, the CII uses email as our principal method of communication. From time to time, we may wish to electronically draw your attention to other CII products and services which are likely to be of interest to you. I consent to receiving marketing communications from the CII by email.

Yes
No

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

Sharing your data with local institutes

CII local institutes provide access to a programme of services including CPD events, training and networking opportunities designed to support you and complement your CII membership. We will share your data with your local institute (UK, Channel Islands and Isle of Man based members only) so they may send you relevant email communications. I consent to the CII sharing my data with my local institute. \square Yes \square No

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

Date			

Notes

1. Local institutes/PFS regions

The network of 58 UK local institutes and 27 PFS regions are local hubs situated throughout the UK, Channel Islands and Isle of Man that deliver a range of regional services, including:

- Technical and regulatory seminars and training courses
- Career guidance, mentoring and knowledge services
- Social and networking activities
- Community engagement initiatives
- · Local news and information.

2. Faculties

As a CII member you are able to join a faculty for free. Faculties provide access to market-relevant information and career support. More information can be found at cii.co.uk/faculties

- Insurance Broking Faculty
- Life & Pensions Faculty
- Claims Faculty
- Learning & Development Faculty
- Underwriting Faculty
- · Society of Mortgage Professionals



The Chartered Insurance Institute

CII Customer Service, 42-48 High Road, South Woodford, London E18 2JP Tel: **+44 (0)20 8989 8464**

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