



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](mailto:societies.fas@cii.co.uk)**

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

|                        |         |   |
|------------------------|---------|---|
| Enrolment fee and BEP  | £342.00 | £ |
| Re-enrolment fee only* | £237.00 | £ |

☐ Tick here if you have already completed the BEP and are only paying the re-enrolment fee.

**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

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 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: [www.cii.co.uk/mycii](http://www.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 [www.cii.co.uk/mycii](http://www.cii.co.uk/mycii) and updating your preferences.

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](mailto:customer.serv@cii.co.uk)

Signature

Date

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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](https://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