

Centre of Excellence Membership and Exemption Application Form

Please note that all questions should be answered. Please write in black ink and use capitals.

CISI MCSI Exemption 2014/15

1. Personal details

Title _____ First name(s) _____
Surname _____
Private address _____
_____ Postcode _____
Tel. _____ Fax _____
Email _____ Date of birth _____
Nationality _____
Former name(s) if any _____
Date of change _____
Candidate reference number _____

2. Work details (if applicable)

Firm name _____
Job title _____
Department _____
Firm address _____
_____ Postcode _____
Direct tel. _____
Direct fax _____
Email _____

3. CISI Qualifications **gained** **being studied** (please tick and give details)

4. Other Professional Qualifications (please attach a certified copy of the pass certificate)

Professional Qualifications	Designatory letters
_____	_____
_____	_____

5. Contact information (tick one)

Correspondence to be delivered to: Work Home

Address to appear in Members' directory: Work Home None

Who will pay your annual subscription? Employer Self

If Employer, please provide the following information:

Department _____ Cost centre _____

Contact name _____ Address (if different from above) _____

6. Centre of Excellence details

Name of University _____
Name of Postgraduate Programme studied and achieved _____

Programme start date (mth/yr) _____
Programme end date (mth/yr) _____
Graduation date (mth/yr) _____

7. Declaration

1. I have not been adjudged bankrupt or insolvent or compounded with my creditors and I am not currently subject, or have been subject, to disciplinary procedures by the FSA, FCA, other regulator or any professional body within the past five years.

2. I apply to become a member of the Chartered Institute for Securities & Investment and agree to abide by the Royal Charter, Bye-laws, Regulations, and to uphold its high standards as published in its Professional Code (all available from website). Any breach of the Regulations may give rise to disciplinary procedures and termination of my membership

3. I agree to maintain competence through CPD as outlined in Annex 3 of the Membership Regulations

4. I know of no reason why I should not become a member.

Signature _____
Name in full _____

8. Referee

(Only required for applicants who do not have regulatory approval.)
The referee must be either a professional (eg, accountant, lawyer) or your tutor.
I support (full name) _____
in applying to become a member of the Chartered Institute for Securities & Investment. I believe from my personal knowledge of him/her, that he/she fulfils the requirements of the Chartered Institute for Securities & Investment.

Signature _____
Name in full _____
Job title _____
Date _____

In order to apply for an exemption you must have:

- graduated from a CISI accredited Masters programme
- taken the CISI online integrity test 'IntegrityMatters' and achieved a 'pass' grade

A copy of your Masters certificate, and your IntegrityMatters certificate, must be attached to this form (your exemption cannot be processed without these supporting documents.) The CISI may confirm your Masters award with the University.

I am eligible and wish to apply for Exemption of the CISI Diploma @ £200

I am eligible and wish to apply for full memberships (MCSI) at the appropriate pro-rata membership fee (see below) (joining fee normally £50 - not charged)

I am currently a CISI Student Member. I am eligible and wish to apply for Exemption of the CISI Diploma @ £150 and a membership upgrade to MCSI at the appropriate pro-rata membership upgrade fee (see below) (joining fee normally £50 - not charged)

Pro-rata membership fees 2014/15

	Aprl-Jun	Jly-Sept	Oct-Dec	Jan-Mch
MCSI Pro-rata Membership Fee	£180.00	£135.00	£90.00	£225.00
MCSI Pro-rata Membership Upgrade Fee	£125.00	£93.75	£62.50	£156.25

PAYMENT: Please fill out the appropriate information

Payment by Cheque: Cheques should be made payable to 'Chartered Institute for Securities & Investment' and crossed 'Account Payee only'.

Cheque attached

Payment by Card: Chartered Institute for Securities & Investment accepts payment by certain types of payment card – **American Express, Delta, Eurocard, MasterCard, Switch and Visa.** If you would prefer to make your payment by card, please complete the information requested below, then fill out your cardholder details. Forms may then be faxed or posted to the Chartered Institute for Securities & Investment. If submitting the original form by post after having sent it by fax, please tick this box to ensure you are not charged TWICE:

I wish to pay by ***American Express/Delta/Eurocard/MasterCard/Switch/Visa** *Delete as applicable

I authorise you to debit my account with the amount of £.....

Card number:

Expiry date: Switch/AMEX issue date: Switch only issue no: Security code: *

* If you do not wish to send your credit card information via the post, please contact our Customer Support Centre - Telephone +44 20 7645 0777

Cardholder's name: (if different to that on previous page of this form)

Cardholder's address: (if different to that on previous page of this form)

Please note: purchases made with a credit card will incur a 2% surcharge to cover administration & handling fees. This does not apply to debit card transactions.

Cardholder's Signature: Telephone:

DECLARATION: "I declare that the information I have supplied is complete and correct. In considering my application for exemption, I agree to abide by the Royal Charter, Bye-laws, Regulations, and to uphold its high standards as published in its Professional Code (all available from website). Any breach of the Regulations may give rise to disciplinary procedures and termination of my membership. I am happy for the Institute to confirm these details with the relevant issuing body.

Candidate's Signature **Date:**

The FCA requires financial practitioners to remain up to date and updated information regarding your qualification and continuing professional development will be sent to you. Please tick the box if you do not want to receive this information.

Please complete and return to:

Educational Development, Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY
+44 (0)20 7645 0614 educationdevelopment@cisi.org