

Concessionary Affiliate Application Form

All questions to be answered and printed in ink and in block capitals.

Details of admission criteria can be found on our website cisi.org/membership

The concessionary rate is available to those receiving either:

Income support; Income-based Jobseeker's allowance; or Pension Credit / Guarantee Credit

Please attach the following with your application: one proof of identity one proof of entitlement

1. Personal details

Title _____
First name(s) _____
Last name _____
Home address _____

Postcode _____
Tel. (include country and local code) _____
Mobile _____
Email _____
Date of birth DD/MM/YYYY _____
Former name(s) if any _____

2. Work details

Firm name _____
Job title _____
Department _____
Firm address _____

Postcode _____
Tel. (include country and local code) _____
Email _____

3. IntegrityMatters

Obtaining a pass in the CISI's IntegrityMatters is now a requirement for Affiliate membership.

For more information please go to cisi.org/integritymatters

I have passed the IntegrityMatters test

I will pass IntegrityMatters to activate my membership

4. Communications Preferences Please tell us what information you would like to be contacted about

Additional Events: Training Courses Conferences Branch Dinners

Other: Research Surveys Jobs Online

Professional Forums and Interest Groups events in London:

Bond Compliance Corporate Finance International Regulation Financial Planning FinTech Operations

Risk Wealth Management Young Professionals Training, Competence and Culture Paraplanner

Study: Qualifications Bulletin New Qualifications and Pathways Revision Tools

Telephone Communications: Membership Qualifications Events

Your Membership: Membership Upgrades CPD, Networking and Social Events Online Learning Member Survey

The Review Digital Articles The Review Print Magazine Member Updates and News

Membership Directory: Opt in Membership Directory

5. Contact information (tick one)

Correspondence to be delivered to: Work Home

Who will pay annual subscription? Firm Self

If firm, please provide the following information:

Dept: _____ Cost centre: _____

Contact name: _____

Address (if different from above): _____

Please post or email this form to:

Customer Support Centre, Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY

Any questions? applications@cisi.org / +44 20 7645 0777

6. Disciplinary history (tick one)

I have been convicted of a criminal offence

Yes No

Please note that you do not need to disclose protected convictions that are filtered from a standard and enhanced Disclosure and Barring Service (DBS) check.

I have been adjudged bankrupt or insolvent or compounded with my creditors.

Yes No

I have been subject to disciplinary proceedings by the FCA, other regulator or any professional body within the past five years.

Yes No

Please provide details with your application if you have responded Yes to any of the above.

7. Declaration

1. On applying to become a member of the Chartered Institute for Securities & Investment and agree to abide by the Royal Charter, By-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
2. I am aware that CPD is mandatory for CISI members and agree to undertake CPD on an annual basis meeting the CISI CPD requirements to maintain my membership. I understand non-compliance of the CISI CPD requirements can lead to my membership being suspended.
3. If not already achieved, to activate my membership I agree to pass IntegrityMatters. I understand that if not completed within 3 months of joining the CISI my membership will be suspended.
4. I know of no reason why I should not become a member

Signature: _____

Date DD/MM/YYYY

Name in full: _____

8. Payment (Please complete as appropriate)

There is a joining fee of £33 for the Affiliate category and the annual subscription is £70. The subscription is payable at the time of application. **Thereafter, subscriptions are due annually on 1st April.**

The membership fee is payable on a pro-rata basis at any stage of the year. Please tick the following box if you are joining between:

Apr - Jun - £70 Jul - Sep - £52.50 Oct - Dec - £35 Jan - Mar - £87.50 (includes fees for the following subscription year)

If paying by cheque or credit card please ensure you pay the correct pro-rata amount.

Total paid Receipt required

Payment by cheque:

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

Payment by Card:

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

I authorise you to debit my account with the amount of including joining fee where applicable

Please Note: There is no fee for Visa Debit or Delta cards.

Card number: Security code:

Expiry date: ___/___/___ Maestro/AMEX issue date: ___/___/___ Maestro only issue No: _____

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

Card holder's name: _____

Signature: _____

Please post or email this form to:

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