

8. Declaration

- 1. As a member of the Chartered Institute for Securities & Investment 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.
- 2. I agree to maintain competence through CPD by completing 35 hours CPD with a minimum of 21 hours being structured annually.
- 3. I agree to adhere to the marks usage guidelines for the CFP™ marks and other member designations, and understand that non-compliance with any of the above can trigger disciplinary action, and I understand that the CISI has the right to refuse and revoke my right to use the CFP™ mark and other designations where applicable.
- 4. I understand that by holding the CFP™ certification that my personal data will be shared with the Financial Planning Standards Board Ltd, as outlined in the disclaimer at the bottom of this document.

Signature: _____

Name in full: _____

Date: _____

9a. Payment (Please complete as appropriate)

The CFP™ fee is payable at the time of application. **Thereafter the full yearly fee will be taken alongside your membership renewal payment, due annually on 1st April.** The CFP™ fee is payable on a pro-rata basis at any stage of the year. Please ensure that you pay the correct fee for the time of year you are joining:

April - June	£68
July - Sept	£51
Oct - Dec	£34
Jan - March	£85 (for new members joining alongside obtaining CFP™)
	£17 (for existing CISI members)

Payment by firm:

I authorise payment to be invoiced to our general account:

Print name: _____

Signed: _____

Firm reference:

Payment by Card: I wish to pay by card:

Please contact me or other

by telephone/email* to make payment on my behalf.

Telephone number:

Email address:

*If you have selected via email you will receive a payment link from customersupport@cisi.org to complete.

Name:

Signature: _____


Please return your application form to:

CFP™ Certification

Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY
or scan and email a copy to cfp@cisi.org

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CFP™, CERTIFIED FINANCIAL PLANNER™ and  are certification marks owned outside the U.S by Financial Planning Standards Board Ltd ('FPSB').

Chartered Institute for Securities ('CISI') & Investment is the marks licencing authority for the CFP™ marks in the United Kingdom, through agreement with FPSB.

While holding your Certified Financial Planner™ certification, your personal data will be shared between CISI and FPSB once per year so that FPSB may maintain an accurate record of certificate holders in order to:

- verify and validate certifications;
- send necessary outbound communications relating to the CFP certification where CISI are unable to do so;
- validate and audit licence fees owed to FPSB by CISI;
- provide data to support management reporting, accounting activity, fraud detection, financial reporting and/or inform audits.

The personal data to be shared between CISI and FPSB will be limited to: your name, your preferred correspondence address, your preferred contact number, your preferred email address, your country of residence, your employer, and your CFP™ certification identification number. Any such data transfers are subject to binding data sharing agreements between CISI and FPSB, which limits usage of your personal data to the specified purposes only and requires the highest standard of organisational and technical security to protect the integrity and confidentiality of your personal data.

The CISI reserves the right to seek independent verification of all the information supplied on this application form as part of the assessment process.
The CISI reserves the right to refuse applications where information supplied is found to be false