Membership Application Form for ACCA Members

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

1. Which type of Membership are you applying for?  
   - Associate (ACSI)  
   - Full Member (MCSI)  
   CISI Candidate/Membership number (if applicable)  
   ACCA Membership number  
   Please attach a copy of your ACCA membership certificate if possible.  
   (Details of these and all admission criteria can be found on our website cisi.org/acca)

2. 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

3. Work details
   - Firm name
   - Job title
   - Department
   - Firm address
   - Postcode
   - Tel. (include country and local code)
   - Email

4. IntegrityMatters
   Obtaining a pass in the CISI's IntegrityMatters is a requirement for ACSI/MCSI membership.
   For more information please go to cisi.org/integritymatters
   I have passed the IntegrityMatters test  
   I will pass IntegrityMatters to activate my membership

5. 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 and Competence
   - 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

6. Contact information (tick one)
   Correspondence to be delivered to:
   Who will pay annual subscription?
   If firm, please provide the following information:
   - Contact name:
   - Cost centre:
   Address (if different from above):
7. 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.

8. Declaration

1. On applying to become a member of the Chartered Institute for Securities & Investment I agree to abide by the Royal Charter, Byelaws, 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: __/__/____

Name in full: ________________________

9. Payment (Please complete as appropriate)

The Institute has agreed to waive the joining fee for ACCA members. 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 ensure that you pay the correct fee for the time of year you are joining.

<table>
<thead>
<tr>
<th>Pro-Rata Fees 2019/20</th>
<th>Application Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACSI</td>
<td></td>
</tr>
<tr>
<td>£140</td>
<td>£105</td>
</tr>
<tr>
<td>MCSI</td>
<td>£202</td>
</tr>
</tbody>
</table>

Total paid: ____________________________ Receipt required: ☐

Payment by firm: I authorise payment to be invoiced to our general account: ____________________________

Print name: ____________________________

Signed: ____________________________ HR department

Applicants resident in India, Sri Lanka and Pakistan can apply for a discount of 25% off the subscription fee.

Tick here if this applies to you: ☐

* Includes fee for the following subscription year

Payment by Cheque: Cheques should be made payable to: ‘Chartered Institute for Securities & Investment’ 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

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: ____________________________