

CISI CPD Endorsement Application Form

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

1. Which type of activities are you applying to have endorsed? Courses/Events ☐ Online elearning/webcasts ☐ Publications ☐

2. Contact information

Title

First name(s)

Surname

Job title

Direct tel. Mobile

Email

3. Organisational details

Firm name

Department

Firm address

Postcode

Switchboard tel.

Direct fax.

Website

4. Type of organisation (please tick)

Commercial Conference Provider ☐Professional Body ☐Training Provider ☐Trade Association ☐

Other ☐ please specify

5. Areas covered (please tick)

Compliance ☐ Financial planner

Corporate Finance ☐

Investment Management ☐

Operations ☐

Private Wealth Management ☐

Other ☐ please specify

6. Examples of CPD Activities (please include brochures)

Title

Speaker (if applicable)

Length (if applicable)

7. Total number of CPD activities provided annually

Courses/events run annually	Online elearning	Webcasts	Publications
<p>1. Introduction to the Management of the Quality Management System</p> <p>2. Advanced Quality Management System</p> <p>3. Quality Management System for the Construction Industry</p> <p>4. Quality Management System for the Manufacturing Industry</p> <p>5. Quality Management System for the Service Industry</p> <p>6. Quality Management System for the Health Care Industry</p> <p>7. Quality Management System for the Financial Services Industry</p> <p>8. Quality Management System for the Retail Industry</p> <p>9. Quality Management System for the Education Industry</p> <p>10. Quality Management System for the Government Industry</p>	<p>1. Introduction to the Management of the Quality Management System</p> <p>2. Advanced Quality Management System</p> <p>3. Quality Management System for the Construction Industry</p> <p>4. Quality Management System for the Manufacturing Industry</p> <p>5. Quality Management System for the Service Industry</p> <p>6. Quality Management System for the Health Care Industry</p> <p>7. Quality Management System for the Financial Services Industry</p> <p>8. Quality Management System for the Retail Industry</p> <p>9. Quality Management System for the Education Industry</p> <p>10. Quality Management System for the Government Industry</p>	<p>1. Introduction to the Management of the Quality Management System</p> <p>2. Advanced Quality Management System</p> <p>3. Quality Management System for the Construction Industry</p> <p>4. Quality Management System for the Manufacturing Industry</p> <p>5. Quality Management System for the Service Industry</p> <p>6. Quality Management System for the Health Care Industry</p> <p>7. Quality Management System for the Financial Services Industry</p> <p>8. Quality Management System for the Retail Industry</p> <p>9. Quality Management System for the Education Industry</p> <p>10. Quality Management System for the Government Industry</p>	<p>1. Introduction to the Management of the Quality Management System</p> <p>2. Advanced Quality Management System</p> <p>3. Quality Management System for the Construction Industry</p> <p>4. Quality Management System for the Manufacturing Industry</p> <p>5. Quality Management System for the Service Industry</p> <p>6. Quality Management System for the Health Care Industry</p> <p>7. Quality Management System for the Financial Services Industry</p> <p>8. Quality Management System for the Retail Industry</p> <p>9. Quality Management System for the Education Industry</p> <p>10. Quality Management System for the Government Industry</p>

8. Please tick any of the following statements that apply to your courses/events/elearning/webcasts

They are lectures ☐ They are group discussions ☐ They are interactive workshops ☐ They are public ☐

They are private ☐ They are at introductory level ☐ They are at intermediate level ☐ They are at advanced level ☐

They are updates ☐ Attendance certificates are issued ☐

Other ☐ please give details

**9. Average number of attendees
at courses/events** _____

**10. Average course/event length
(net hours, excluding breaks)** _____

**11. Average length of elearning/
webcasts** _____

12. Details of any other relevant CPD activities/publications offered

13. Working with the CISI

If endorsed, would you be willing to offer CISI members attending your events/courses a discount on the standard prices?

Yes ☐ No ☐

If endorsed, would you be willing/able to assist the CISI with finding speakers for our professional events? Yes ☐ No ☐

If endorsed, would you be willing/able to confirm someone's attendance at one of your events/courses? Yes ☐ No ☐

14. Any Other Endorsements Gained

If any other organisation has endorsed your CPD activities, please list them below:

15. Declaration (to be signed by a member of senior management)

I affirm that all information contained herein is true and accurate and agree to inform the Chartered Institute for Securities & Investment in the event of any changes as per the agreement

Signature: _____

Name in full: _____

Date: _____

16. Payment

I would like to confirm the following CISI endorsement package for a 12 month period:

☐ £750 Annual Fee +
£250 Endorsement Fee Per
Activity ☐ £2500 Endorsement For Up To
10 Activities (Includes Annual
Fee) ☐ £5000 Endorsement For Up To
25 Activities (Includes Annual
Fee) ☐ £8750 Endorsement For Up To
50 Activities (Includes Annual
Fee)

Payment by invoice: ☐

If you would like to make payment via card, please provide us with your contact number below and we will call you to take payment.

Contact number: _____

* 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

Please post or email this form to:

Endorsed, Chartered Institute for Securities & Investment, 20 Fenchurch Street, London EC3M 3BY

Any questions? endorsedcpd@cisi.org / +44 20 7645 0600