

Membership Application Form

All answers to be printed in ink and in block capitals.

1. Which type of Membership are you applying for? Affiliate Associate (ACSI) Full Member (MCSI)

CISI Candidate/Membership number (if applicable) **FCA Number** (if applicable)

Please note there are other application forms for upgrades and Individual Charter.

(Details of these and all admission criteria can be found at cisi.org/membership)

CISI membership ©2019

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 MCSI, ACSI and 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

5. Qualifications - If applying on the basis of non-CISI qualifications please provide details (attach a certified copy of the pass certificates)

A full list of qualifications recognised from other professional bodies can be found on our website.

6. 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

7. Contact information (tick one)Correspondence to be delivered to:
Who will pay annual subscription? Work
 Firm Home
 Self

If firm, please provide the following information:

Contact name: _____

Dept: _____ Cost centre: _____

Address (if different from above): _____
_____**8. 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.

9. Declaration

- On applying to become 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
- 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.
- 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.
- I know of no reason why I should not become a member

Signature: _____

Date DD/MM/YYYY _____

Name in full: _____

10. Payment (Please complete as appropriate)The joining fee and subscription are 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. Add this to the joining fee to give the total amount due.

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

Tick here if this applies to you

* Includes fee for the following subscription year

Promotional Code: _____

Pro-Rata Fees 2019/20	Application Period				Joining Fee
	(April - June)	(July - Sept)	(Oct - Dec)	(Jan - March)	
Affiliate	£140	£105	£70	£175*	£33
ACSI	£140	£105	£70	£175*	£33
MCSI	£202	£152	£101	£253*	£55
Total	_____ (must include joining fee)				Receipt required <input type="checkbox"/>

Payment by firm:

I authorise payment to be invoiced to our general account:

Firm reference: _____

Print name: _____

Signed: _____

HR department

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

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: _____

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:**

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

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