

CISI membership ©2023

CISI
CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

CISI Customer/Membership number (if applicable) [][][][][][]

Title

First name(s)

Middle name(s)

Last name

Home address

Postcode

Country

Tel. (include country and local code)

Mobile

Email

Date of birth DD / MM / YYYY

Former name(s) if any

[illegible]

Home (as per section 1) ☐ Work (as per section 2) ☐

Membership Directory: I agree for my membership level to show on the CISI Membership Directory ☐

Additional Events: Training Courses ☐ Conferences ☐ Branch Dinners ☐

Other: Research Surveys ☐ Jobs Online ☐

Bond and Fixed Interest ☐ Compliance ☐ Corporate Finance ☐ International Regulation ☐ Financial Planning ☐

FinTech ☐ Operations ☐ Risk ☐ Wealth Management ☐ Young Professionals ☐ Training, Competence & Culture ☐

Paraplanner ☐

Study: Qualifications Bulletin ☐ New Qualifications and Pathways ☐ Revision Tools ☐

Telephone Communications: Membership ☐ Qualifications ☐ Events ☐

5. Level of Membership Please tick which membership level you are applying for

Details of all admission criteria can be found at cisi.org/membership.

b) Associate (ACSI) – I am level 3/4/5 qualified ☐

c) Full Member (MCSI) - I am level 6/7 qualified ☐

d) Chartered Member (Chartered MCSI) - I have been a personally Chartered member of another relevant Chartered body* for at least 12 months immediately preceding my application and have logged at least 12 months CPD. ☐

Please detail external qualifications / university degrees / memberships and attach a certified copy of your certificate and CV:

*Chartered Insurance Institute (CII), The London Institute of Banking & Finance (LIBF) or the Chartered Bankers Institute (CBI).

6. Disciplinary History Please answer all questions

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.

c) I have been subject to disciplinary proceedings by the FCA, other regulator or any professional body within the past five years. Yes ☐ No ☐

7. Declaration

7. Declaration

- Signature: _____ Date: / /

[illegible]

8. 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.

Pro-Rata Subscription Fees 2023/24

Application Period

	Joining fee	April - June	July - Sept	Oct - Dec	Jan - March*
Affiliate	£33	£156	£117	£78	£195
ACSI	£33	£156	£117	£78	£195
MCSI	£55	£226	£169.50	£113	£282.50
Chartered MCSI	£55	£226	£169.50	£113	£282.50

* Includes fee for the following subscription year.

Promotional Code:

Please confirm applicable costs as per subscription fee table above:

Joining fee:

Subscription fee:

Total:

Who will pay future subscription? ☐ Firm (details to appear on firms Billing Portal) ☐ Self

Payment by Firm:

Firm reference:

I authorise payment to be invoiced to our general account:

Print name:

Signed:

Department:

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:

Checklist Please ensure you have reviewed the following:

- Completed all sections of the form.
- Applied for the correct level of membership dependant on your eligibility.
- Attached external certificates and your CV to the application (if applicable).
- Authorised the correct cost for payment. This will include a set joining fee, and a pro-rata subscription fee which will change dependant on when you apply for membership.

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