

New Membership Application

Please complete all sections of this form in BLOCK CAPITALS



CISI Customer/Membership number (if applicable)

1. Personal details

Title	<input type="text"/>
First name(s)	<input type="text"/>
Middle name(s)	<input type="text"/>
Last name	<input type="text"/>
Home address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Country	<input type="text"/>
Tel. (include country and local code)	<input type="text"/>
Mobile	<input type="text"/>
Email	<input type="text"/>
Date of birth	<input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> / <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Former name(s) if any	<input type="text"/>

2. Work details

Firm name	<input type="text"/>
Job title	<input type="text"/>
Department	<input type="text"/>
Firm address	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
	<input type="text"/>
Country	<input type="text"/>
Tel. (include country and local code)	<input type="text"/>
Email	<input type="text"/>

3. Contact Information Please tick one option where you would prefer your correspondence to be sent to

Home (as per section 1)	<input type="checkbox"/>	Work (as per section 2)	<input type="checkbox"/>
Membership Directory: I agree for my membership level to show on the CISI Membership Directory <input type="checkbox"/>			

4. Communications Preferences Please tell us what information you would like to be contacted about

Additional Events:	Training Courses	<input type="checkbox"/>	Conferences	<input type="checkbox"/>	Branch Dinners	<input type="checkbox"/>
Other:	Research Surveys	<input type="checkbox"/>	Jobs Online	<input type="checkbox"/>		
Professional Forums and Interest Groups events in London:						
Bond and Fixed Interest	Compliance	<input type="checkbox"/>	Corporate Finance	<input type="checkbox"/>	International Regulation	<input type="checkbox"/>
Financial Planning	FinTech	<input type="checkbox"/>	Operations	Risk	<input type="checkbox"/>	Wealth Management
Young Professionals	Training, Competence & Culture	<input type="checkbox"/>	Paraplanner	<input type="checkbox"/>		
Study: Qualifications Bulletin	<input type="checkbox"/>	New Qualifications and Pathways	<input type="checkbox"/>	Revision Tools	<input type="checkbox"/>	
Telephone Communications: Membership	<input type="checkbox"/>	Qualifications	<input type="checkbox"/>	Events	<input type="checkbox"/>	

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 ☐

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

For MCSI membership you should have at least three years of relevant experience.

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 ☐

Please provide details with your application if you have responded Yes to any of the above.

7. Declaration

- Signature: _____ Date: / /

Name in full:

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.

Pricing schedule below reflects a discount of 50% off the subscription fee for Affiliate, ACSI and MCSI membership registered via the Stock Exchange of Thailand

Pro-Rata Subscription Fees 2023/24		Application Period			
	Joining fee	April - June	July - Sept	Oct - Dec	Jan - March*
Affiliate	£33	£78	£58.5	£39	£97.5
ACSI	£33	£78	£58.5	£39	£97.5
MCSI	£55	£113	£84.75	£56.5	£141.25

* 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