

**CISI**  
CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT

This application form is for non-members applying for Affiliate, Associate (ACSI), full Member (MCSI) or Chartered Member (Chartered MCSI). This form can only be used for non-CISI members. If you are already a CISI member and wish to upgrade to Chartered MCSI, please use the Individual Charter Application Form available at [cisi.org/charter](https://www.cisi.org/charter)

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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

Your membership level is awarded based on your relevant qualifications or external membership levels held.

Details of all admission criteria can be found at [cisi.org/membership](http://cisi.org/membership).

a) **Affiliate** – I don't hold any relevant qualifications at present ☐

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

CISI Exam ☐ External Exam ☐ External Membership ☐

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

CISI Exam ☐ External Exam ☐ External Membership ☐

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:

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

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

## 6. Disciplinary History Please answer all questions

a) I have been convicted of a criminal offence.

Yes ☐ No ☐

*Please note that you do not need to disclose convictions that are spent under the Rehabilitation of Offenders Act 1974, or protected convictions that are filtered from a standard or enhanced Disclosure and Barring Service (DBS) check.*

b) I have been adjudged bankrupt or insolvent or compounded with my creditors.

Yes ☐ No ☐

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

- On applying to become a member of the Chartered Institute for Securities & Investment I agree to abide by the Royal Charter, By-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:   /   /

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 2025/26		Application Period											
2025/2026 £	Joining fee	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan*	Feb*	Mar*
Affiliate	16.5	83.5	76.54	69.58	62.62	55.66	48.71	41.75	34.79	27.83	104.37	97.41	90.46
Associate (ACSI)	16.5	83.5	76.54	69.58	62.62	55.66	48.71	41.75	34.79	27.83	104.37	97.41	90.46
Full Member (MCSI)	27.5	121	110.91	100.83	90.75	80.66	70.58	60.5	50.41	40.33	151.25	141.16	131.08
Chartered MCSI (Ch MCSI)	27.5	121	110.91	100.83	90.75	80.66	70.58	60.5	50.41	40.33	151.25	141.16	131.08

\* 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