



**The Insurance  
Institute of Leicester**

**Handbook  
and  
Programme of Events  
2008-09**

**President:  
Brian Brookes Dip CII. MinstLM**

Dear Member of The Insurance Institute of Leicester

It is my role to host, facilitate and co-ordinate the various events which we organise (with much assistance from our Council Officers). I have been employed in the insurance sector for all of my career and I continue to find our industry to be always interesting, often exciting, and certainly challenging.

Everything from the provision of our examination facilities to the educational seminars which we hold, the Annual Dinner, our charitable donations, our social functions etc, would not be possible without our Council giving up their own personal time to make such events happen. I would strongly urge you to show your appreciation to our Council members by making a very small gesture - namely supporting our events. Our Programme is designed to cater for a wide cross-section of our membership, and I would be grateful to see some new faces (as well as the old ones!) over the next 12 months or so.

The insurance industry is currently facing some challenging times - with the advent of regulation, contract certainty, the soft market, delivery of service levels - and so on. I firmly believe that a problem shared is a problem halved, therefore, if we, as your local institute, can assist you with any particular difficulties that you are experiencing, please do not hesitate to get in touch. Whilst we may not always have all the answers that you need, we do have access to a wide range of contacts in the industry, and we will do our best to answer your query, or to get your point of view or concern to the relevant person or company.

My nominated charity for my presidential year is the Special Olympics to be held in Leicester in 2009. It will be the largest sporting event ever held in Leicester and the fund raising has already commenced. For further details please log into [www.sol2009.com](http://www.sol2009.com).

From a personal point of view, I am very proud to be involved with The Insurance Institute of Leicester. To have been elected President is very special to me, and I am looking forward to serving this excellent local institute.

Best Wishes  
**Brian Brookes**

## Officers 2008 - 2009

### **President**

**Brian Brookes Dip CII. MInstLM**

0116 252 7485                      brian.brookes@leicester.gov.uk

### **Deputy President**

**Grant Scott ACII Chartered Insurance Practitioner**

07836 550 461                      grant.scott@cld.uk.com

### **Secretary**

**Mary Rogerson**

0116 286 6255                      mary.rogerson@uwclub.net

Address and full contact details are opposite inside back page

### **Treasurer**

**Mal Fairhurst ACII**

0116 241 6127                      malfair@aol.com

### **Education Secretary**

**Sue Hull ACII**

0116 204 2946                      hull.s@berkeleyburke.co.uk

### **Education Committee Chairman**

**Bruce Teago ACII Chartered Insurer**

0116 256 2031                      teagob2@norwich-union.co.uk

### **Student Support and Mentoring Officer**

**Sue Hull ACII**

0116 204 2946                      hull.s@berkeleyburke.co.uk

### **Membership Secretary**

**Keith Torrance FCII DMS MCIMgt Ch'td Practitioner**

0116 223 0215                      keithtorrance@enterprise.net

### **Dinner Secretary**

**Mary Rogerson**

0116 286 6255                      mary.rogerson@uwclub.net

### **Young Members / Sports & Social Secretary**

**Brian Brookes Dip CII. MInstLM**

0116 252 7485                      brian.brookes@leicester.gov.uk

### **Membership Communications Officer**

**Grant Scott ACII Chartered Insurance Practitioner**

07836 550 461                      grant.scott@cld.uk.com

### **Press, Publicity and Sponsorship Officer**

**Paul Lomas**

0116 260 0506                      paul@harboroughportas.com

## **Other Council Members 2008 - 09**

**Simon Allbright ACII Chartered Insurance Broker**  
0116 272 0002                      simon@abr-insurance.co.uk

**Martin Briers MPhil FCII  
Chartered Insurance Practitioner**  
0116 287 2867                      martin.briers@lineone.net

**Sue Banbury Dip CII**  
0116 252 2769                      sdb16@le.ac.uk

**Roger Corp BSc (Hons) ACII FCILA**  
07984 544 444                      roger@bch.uk.com

**Henryk Cynkar BA Hons, FCII  
(Immediate Past President)**  
0116 280 7504                      henryk.cynkar@ars.aon.co.uk

**Julie Flynn**  
0116 242 3350                      jflynn@brokerbility.co.uk

**James Fogg Cert CII**  
0116 299 9015                      james.fogg@turnerand.co.uk

**Gill Ford ACII**  
0116 272 8815                      gill@abr-insurance.co.uk

**Andy Miller**  
0116 222 8270                      amiller@brettandrandall.co.uk

**Peter Turner ACII**  
0116 299 9005                      peter.turner@turnerand.co.uk

**David Webster ACII  
(Charities Representative)**  
0116 259 3717                      5 Kingfisher Close, Great Glen

**East Midlands Representative to CII National Council  
Keith Torrance FCII DMS MCIMgt  
Chartered Insurance Practitioner**  
0116 223 0215                      keithtorrance@enterprise.net

## Office Representatives

<u>Office</u>	<u>Contact</u>
Abbott Insurance Services Ltd	Steve Wright
Allbright Bishop Rowley Ltd	Gill Ford
Alliance & Leicester PLC	Robert Preston
AON	Henryk Cynkar
AWD Home Finance	David Fuller
AWD plc	James Peters
T F Bell Insurance Group	Stewart Cooper
Berkeley Burke (UK) Ltd	Sue Hull
Blythin & Brown Ltd	Steve Lewis
C J Bott Insurance Brokers Ltd	Chris Bott
Andrew Bourne & Co	David Allen
Brett & Randall Ltd	Andy Miller
Building & Land Guarantees	Paul Rose
CET Group	Rebecca Radford
Centrica	Jon Humberstone
Clear & Lane	Mike Simms
Cunningham Lindsey UK	Dave Williams
Eaga Insurance Services	Jeremy Strutt
Earl Shilton Financial Services	Colin Gibson
Eastlake & Beachell	John Howe

<b>Endsleigh Insurance Co</b>	<b>Helen Baxter</b>
<b>Equity Insurance Brokers</b>	<b>Rob Browett</b>
<b>Fehnert PLC</b>	<b>Sedja Hunt</b>
<b>James Hampden Ins Brokers</b>	<b>Alison Royle</b>
<b>Harborough Portas</b>	<b>Paul Lomas</b>
<b>Roger Harris &amp; Co</b>	<b>Ritesh Chauhan</b>
<b>Hastings Direct</b>	<b>Sarah Johnson</b>
<b>Hays Insurance</b>	<b>Natalie Gillett</b>
<b>Hornbuckle Mitchell Group</b>	<b>Kassandra Mawson</b>
<b>HSP Financial Planning Ltd</b>	<b>Martyn Holmes</b>
<b>Hyrifa</b>	<b>Mick Remington</b>
<b>Independent Appointments</b>	<b>Rachel Goodman</b>
<b>Independent Insurance Bureau</b>	<b>Justin Crocker</b>
<b>Kelly Insurance Services</b>	<b>Jo Cole</b>
<b>Leicester City Council</b>	<b>Brian Brookes</b>
<b>Leicester University</b>	<b>Sue Banbury</b>
<b>Leicestershire County Council</b>	<b>David Marshall-Rowan</b>
<b>Lewin Hicking Partnership</b>	<b>David Lewin</b>
<b>LFE Insurance Services Ltd</b>	<b>Adrian Paintin</b>
<b>Marsh &amp; Co</b>	<b>Kate Hartopp</b>
<b>Marsh UK Ltd</b>	<b>Debbie Day</b>

<b>Martin Bown &amp; Co</b>	<b>Christopher Martin</b>
<b>Midlands Claims Service</b>	<b>Keith Torrance</b>
<b>NIG Insurance Group</b>	<b>Steve Gray</b>
<b>Norwich Union Insurance Group</b>	<b>Bruce Teago</b>
<b>Norwich Union - Willis Network</b>	<b>Elisa Simmons</b>
<b>Oval Group</b>	<b>Kathryn Moon</b>
<b>Pointon York SIPP Solutions</b>	<b>Neil Stokes</b>
<b>ServiceMaster Ltd</b>	<b>Ian McCormack</b>
<b>P F Spare Insurance Brokers</b>	<b>Rob Spare</b>
<b>Swinton Budget Insurance</b>	<b>Rachel Farthing</b>
<b>Swinton Brokers</b>	<b>Samantha Flowers</b>
<b>Towergate Risk Solutions</b>	<b>Jo Selfridge</b>
<b>Towergate Wilsons</b>	<b>Ellen Hunt</b>
<b>Turner &amp; Co</b>	<b>James Fogg</b>
<b>C D Wain &amp; Co</b>	<b>Richard Wain</b>
<b>West Humberstone Agencies</b>	<b>Paul Heggs</b>
<b>Whitman Gowdridge Ins Brks</b>	<b>Andrew Whitman</b>
<b>Willis UK</b>	<b>Martin Commins</b>
<b>Willow Financial Management</b>	<b>Philip Martin</b>

### **Recent Past Presidents**

- 1969-1970 Derek J Woodward, ACII (Norwich Union)  
1970-1971 H E Mellor, FCII (Sun Alliance & London)  
1971-1972 C A Elson (Commercial Union)  
1972-1973 D S Milnes, ACII (Phoenix)  
1973-1974 D P Graham, FCII (Sun Alliance & London)  
1974-1975 L G Tate, ACII, FCIB (Bankart Midlands Ltd)  
1975-1976 J R Simpson, FCILA (Thomas Howell Selfe)  
1976-1977 G Godkin, ACII (Phoenix)  
1977-1978 F G Hopps, ACII (Eagle Star)  
1978-1979 G E R Papworth, ACII (Phoenix)  
1979-1980 C J Shaw, FCII (Shaw & Bennett & Co Ltd)  
1980-1981 J F Blunt, FCII (General Accident)  
1981-1982 J M Shaw, ACII (Phoenix)  
1982-1983 D E Wooldridge, FCII (Norwich Union)  
1983-1984 P J Massey, ACII, ACILA (Thomas Howell )  
1984-1985 H R Mowatt, FCII (Phoenix)  
1985-1986 M B Bullet, FCII, FCILA (McLaren Dick & Co)  
1986-1987 Mrs P M Millers, ACII, ABIBA (Harrap Bros)  
1987-1988 D Pennington, BA, FCII (Norwich Union)  
D L Turnidge, MA, FCII (Provincial)  
1988-1989 D A Oatway (Legal & General)  
1989-1990 R L Cromar, FCII (Royal)  
1990-1991 Mrs C A Wilson, BA, FCII (General Accident)  
1991-1992 M G Briers, FCII (Norwich Union)  
1992-1993 P J Shaw (Shaw Bennett & Co)  
1993-1994 D A Webster, ACII (General Accident)  
1994-1995 P N Shaw, FCII, FCILA (Massey & Shaw)  
1995-1996 B R Teago, ACII (Royal)  
1996-1997 A G Mistry, ACII (Brett & Randall)  
1997-1998 Mrs M C Rogerson (General Accident)  
1998-1999 M W Fairhurst, ACII (Royal)  
1999-2000 S C Randall, FCII (Brett & Randall)  
2000-2001 J E Fogg (Beckett Remington Collins)  
2001-2002 P G Lomas (Harborough Portas)  
2002-2003 G M Spriggs FCII (Aon Ltd)  
2003-2004 Roger Corp BSc (Hons) ACII, FCILA  
(Cunningham Lindsey)  
2004-2005 Mrs Gill Ford ACII (Allbright Bishop Rowley)  
2005-2006 Keith Torrance FCII DMS MCM I  
(Midlands Claims Service)  
2006-2007 Simon Allbright ACII (Allbright Bishop Rowley)  
2007-2008 Henryk Cynkar BA Hons, ACII (Aon)

## **The Chartered Insurance Institute (CII)**

The Chartered Insurance Institute is the premier professional organisation for those working in the insurance and financial services industry. It is dedicated to promoting higher standards of competence and integrity through the provision of relevant qualifications for employees at all levels and across all sectors of the industry.

The Chartered Insurance Institute's mission statement is **“Protecting the public by guiding the profession”**.

### **Objectives of The Chartered Insurance Institute**

The objects and purposes for which the Institute is constituted are as follows:

- To promote efficiency and improvement in the practice of insurance among persons engaged or employed in that activity, whether Members of the Institute or not, to render the conduct of such business more effective and professional, to secure and justify the confidence of the public and employers by the conduct of reliable tests of the competence of persons engaged or employed in insurance and the provisions of reliable assurances of their trustworthiness and to provide and maintain a central organisation for those purposes;
- To promote and assist the study of any subjects bearing on any branch of insurance;
- To collect and form a body of expert opinion on the law and practice relating to all things connected with insurance;
- To exercise supervision and control over the professional standards and conduct of the Members. To seek to improve the professional status of Fellows and Associates and to promote the interests, welfare and advancement of the Members in general;
- To provide information and advice about employment in insurance for Members and others;
- To assist Members and the dependants of Members or of deceased Members suffering financial hardship by such measures as may be deemed appropriate and to contribute directly or indirectly to the work of The Insurance Charities and any other appropriate fund or charity.

## **Faculties and Societies**

Over the past three years, the CII has introduced a number of Faculties and Societies. These are forums for all those engaged in certain market sectors within insurance and financial services, regardless of level of experience. With statutory regulation and other changes, there is an ever-greater need for support with relevant competence, training and compliance requirements: also access to specific market information.

Membership of one faculty or society is free. £10pa for each additional faculty or society. They are:

### **Personal Finance Society (PFS)**

The Personal Finance Society is the professional body for financial advisers and planners and those supporting the financial advice or planning process. The PFS mission statement is: “To establish and develop professional standards among our members for the benefit of the consumer”.

### **Society of Mortgage Professionals**

Membership is open to all mortgage practitioners. Certificate level membership is for those who have passed one of the accredited mortgage regulatory qualifications.

### **Faculty of Life and Pensions**

The forum for everyone who works for Life and Pension providers.

### **Faculty of Claims**

Dedicated to raising standards and levels of professionalism across the claims community. Provides recognition through claims designations: Cert CII (Claims) and Dip CII (Claims).

### **Faculty of Underwriting**

Focuses on enhancing underwriting competence, raising standards and providing assessments appropriate to the application of underwriting.

### **Faculty of Insurance Broking**

The market forum for everyone working in insurance broking.

### **London Market Faculty**

Manages the Lloyd’s and London Market Introductory Test (LLMIT). Also the Certificate in Contract Wording.

## **The Insurance Institute of Leicester (IIL)**

The Insurance Institute of Leicester serves insurance and financial services professionals living or working in Leicestershire and Rutland. Its primary objectives are to:

- provide local facilities, encouragement and assistance for student members taking CII examinations
- provide continuing educational opportunities locally for all members so that professional development can be maintained
- facilitate social activities for members
- raise money for charity: both Insurance charities and other worthwhile causes
- support the objectives of Chartered Insurance Institute

Founded in 1914, it now has over 1,100 members. At July 2008, these included:

60 Fellows of CII	4 Fellows of PFS
221 Associates of CII	24 Associates of PFS
49 Diplomas of CII	61 Diplomas of PFS
105 Certificates of CII	249 Certificates of PFS
329 Ordinary members	42 Ordinary members

29 members hold both CII and PFS qualifications. We have 183 Chartered Titleholders.

The Institute is administered by its Council which meets around six times a year. Officers and council members are all unpaid volunteers.

We write to all members twice a year: once enclosing this Handbook and in April with our annual report and AGM notification. News is also posted onto our website and we send an occasional e-mail update to those members whose e-mail address we hold. If you change any of your contact details, please notify CII. They update our records monthly.

## **Personal Finance Society (East Midlands)**

PFS (East Midlands) covers Northamptonshire, Leicestershire, Derbyshire and Nottinghamshire.

**Chairman:** **Jonathan Allwight**  
Professional Assurance Services Ltd  
0115 941 8686 jonathan@pasifa.co.uk

**Vice Chairman:** **Catherine Ball**  
Foxbridge Independent Financial Solutions  
0870 762 7007 cath@foxbridgeifs.co.uk

**Education Officer:** **Bill Lane**  
Prudential  
01786 408 371 bill.lane@prudential.co.uk

The Society holds regional meetings at:  
The White House Hotel  
Packington Hill  
Kegworth DE74 2DF

These are full day meetings 10am – 4pm. They deliver a range of speakers providing motivation, business ideas, regulatory information and technical content.

The next conference is being held jointly with West Midlands PFS on 19 September at Heritage Motor Centre, Gaydon, Warks CV35 0BJ. The next Kegworth meeting is provisionally set for 18 December. Free to PFS members, there is generally a £60 charge to non-members, including other CII members.

Please check website [www.thepfs.org](http://www.thepfs.org) for details of these meetings and booking arrangements. If you have any queries about them, please contact 'Meeting Point' on 0845 166 8415.

More than half of CII examination candidates in Leicester are taking PFS examinations. If you can spare around three hours to assist with invigilation in Leicester in October and / or April, please contact our Education Secretary, Sue Hull, at [hull.s@berkeleyburke.co.uk](mailto:hull.s@berkeleyburke.co.uk) 0116 204 2946.

PFS members are welcome at all events arranged by The Insurance Institute of Leicester and attend as members of CII. Membership of PFS gives automatic access to CII membership benefits, although the same is not true in reverse.

## Our Charities

The President's nominated charity for his presidential year is the Special Olympics to be held in Leicester in 2009. It will be the largest sporting event ever held in Leicester and the fund raising has already commenced. For further details please log into [www.sol2009.com](http://www.sol2009.com)

In addition, Leicester Institute always supports **The Insurance Charities** (which now combines The Insurance Benevolent Fund and The Insurance Orphan's Fund). This is the major charity providing financial support to insurance people and their dependants.

Anyone who has spent at least five years employed by an insurance company or intermediary is eligible to apply for financial support in times of difficult. Membership of The Chartered Insurance Institute (CII) is not a requirement.

Help may be given for a one-off need or on a continuing basis. Those who are suffering financial hardship as a result of misfortune can count on the insurance industry's own charity to provide support. Individuals can approach the charity direct c/o CII or via the local representative in the Leicester area, David Webster on 0116 259 3717. Each potential applicant can talk matters through in the privacy of his or her own home: financial details disclosed remain confidential.

## Continuing Professional Development

The revised scheme introduced in 2006 applies to all holders of designations across CII, including PFS. The scheme is output based and requires consideration of development in respect of:

- technical knowledge
- business knowledge and skills
- interpersonal skills

Completed activities earn credits. 100 credits must be earned each year.

Some sample activities are:

training course	25 per course
seminars	15 per seminar
conferences	20 per conference
structured discussions	10 per discussion
on-job-training	20 per subject
training for others	20 per subject
self-managed learning	20 per subject
computer based training	20 per subject
college attendance	25 per course
sitting an examination	50 per exam (incl study)
exam setting / moderation	25 per exam
technical authorship	25 per item
reading 12 issues of journal	15 credits
reading a text book	15 credits
CII / PFS meetings	15 per meeting
business development	20 per product / system
informal study	15 per subject

Please see CII literature or website for full definitions of each acceptable activity. Definitions are tight and frequently require structure and / or external moderation.

The following are excluded activities:

- social activities – local Institute or at work
- examination invigilation
- discussions, sales or promotional meetings
- routine day-to-day work.

## **Local Examination Prizes**

The Insurance Institute of Leicester wishes to encourage everyone in the industry to take examinations and awards prizes to members for superior performance. For the examination year concluding August 2008, the prize structure is:

**Mellor Plate and £150 for any candidate completing FCII.**

**£150 for any candidate completing Fellow of PFS.**

**Papworth Plate and £150 for best performance in completing ACII**

**Prize of £150 for best performance in completing Associate of PFS**

**Mowatt Plate and £100 for best performance in completing Dip. CII**

**Prize of £100 for best performance in completing Dip PFS**

**Prize of £100 for best performance in completing Cert. CII**

**Prize of £100 for best performance in completing Cert PFS**

**Prizes are also awarded nationally by CII.**

### Recent Past Prize Winners

2007	Maria Shorthouse not awarded Jane Chesterton Phillip Adams Joanna Wilson Peter Smith	Best ACII / Papworth Best APFS Best Dip CII / Mowatt Best Dip PFS Best Cert CII Best Cert PFS
2006	Sean Naylor Michael Cox Timothy Pearson Michael Sayers Nigel Brant	Best ACII / Papworth Best APFS Best Dip CII / Mowatt Best Cert CII Best Cert PFS
2005	Stephen Morton Martyn Holmes Kiran Kaur Heather Waters Michele Drinkell Gary Withers Subhash Bhundia	FCII / Mellor FPFS Best ACII / Papworth Best AFPC results Best Dip CII / Mowatt Best Cert CII Best FPC results
2004	Julian Rowatt Joanna Springthorpe Mandy Caunt Ian Hunt Jane Chesterton	Best ACII / Papworth Best CIP / Mowatt Best AFPC results Best FPC results Best IFC results
2003	Stephen Boorman Kathryn Dunsmore Andrew Rastrick Karen Sutton	Papworth Plate Mowatt Plate Best AFPC results Best FPC results
2002	Tammie North Rebecca Edwards Colin Marchment Nigel Geary	Mowatt Plate Best AFPC results Best FPC results Best IFC results
2001	Mrs J C Smith Marie Dearing Donna Leach Sarah Drew	Papworth Plate Mowatt Plate Best AFPC results Best IFC results
2000	Richard Wheatley	Best AFPC results (no others awarded)

## **Chartered Insurance Institute Levels of Examination and Membership**

### **Award in Insurance**

This is the starting point for someone new to the industry and/or not yet ready to commit to studying for a higher qualification. The 'Foundation Insurance Test' is a single unit course which generates a record of Achievement and six credits to the Certificate of CII (see next paragraph). This examination is also now available on-line.

### **Certificate in Insurance (Cert CII)**

This is the 'core' level, suitable for those entering the industry and gaining essential basic knowledge. There are no entry requirements. There are six certificate units, 15 credits per unit, 40 credits required. Examinations are now on-line. (our on-line centre is Burleigh College, Loughborough.) Continuing Professional Development is required to maintain designation.

### **Diploma in Insurance (Dip CII)**

This recognises 'technical' development achieved by those with a growing understanding of the industry. There are nine diploma units, 20 or 25 points per unit, 110 credits required (including some carry forward from Certificate). Examinations are held twice-yearly. Continuing Professional Development is required to maintain designation.

### **Advanced Diploma (ACII)**

This is the 'professional' qualification awarded to experienced and expert market practitioners. 31 units, 30 or 40 credits per unit, 290 credits required (including some carry forward from Certificate and Diploma). Examinations are held twice-yearly. Continuing Professional Development is required to maintain designation. Holders can apply for Chartered status.

### **Fellow of The Chartered Insurance Institute (FCII)**

This is the highest designation in the industry and requires ACII plus dissertation, major project or attainment of another professional / managerial qualification. There is also an ethics programme and three years' Continuing Professional Development after ACII.

## **Personal Finance Society Levels of Examination and Membership**

### **Certificate in Financial Administration**

Two examinations: UK financial services, regulation and ethics. And either Life Office admin or Pensions admin.

### **Cert PFS**

This Certificate will give you the minimum benchmark level of competence required by the regulatory bodies before you can practice as a financial adviser. You can study for the Certificate in Financial Planning whatever your educational background. The five subjects are UK financial services, regulation & ethics, investment & risk, financial protection, retirement planning and integrated financial planning. Additional units on mortgage advice, lifetime mortgage activities and long term care can also be taken. Examinations are now mostly on-line. (Leicester is not yet an on-line centre but hopes to be shortly).

### **Diploma of PFS**

Members who have 140 examination credits with 80 at Diploma or AFPC level are entitled to use the designation Dip PFS.

### **Associate of PFS (APFS)**

Members who have 230 examination credits, with 170 at Diploma level and 120 at AFPC level can display the designation APFS.

### **Fellow of PFS (FPFS)**

Members who have 350 credits with 290 at Diploma level and 210 at AFPC level can display the designation FPFS.

### **Chartered Financial Planner**

Members with 290 examination credits can apply for this title. It is exclusive to the CII, derived from the Privy Council and is first degree standard,

## **Benefits of Membership**

- Leicester Institute: attend seminars, workshops and events to keep up competence and learn about what is happening in the area through networking opportunities.
- Discount prices on study materials.
- Discounted access to the CII's online training and compliance system. Designed to meet the needs of the general insurance and financial services industry, it provides training, a wide variety of qualifications and also addresses regulatory compliance and competence issues.
- Free subscription to The Journal, the UK market's leading insurance publication, with news, analysis and comment on current issues.
- Free access to CII Information Services which provide a wide range of technical and market information on insurance, risk and related financial services. This includes exclusive online resources at [www.cii.co.uk/knowledge](http://www.cii.co.uk/knowledge), document delivery services and admission to the CII library, one of the largest collections of its kind in the world.
- Careers Information Service
- The opportunity to join a dedicated Faculty or Society to support your development e.g. Claims, Insurance Broking, Underwriting, Personal Finance Society, Life and Pensions, London Market or Mortgage Professionals.
- Member's discount to CII and PFS events.
- Insurance Charities: because you never know what's around the corner.
- Post magazine discount. 49% for students. 20% for other members.

## **Code of Ethics and Conduct**

The key values which set the standards for behaviour of all CII members are:

Behaving with responsibility and integrity in their professional life and taking into account their wider responsibilities to society as a whole. Acting in a courteous, honest and fair manner. Never putting their interests above the legitimate interests of their stakeholders.

Complying with all relevant laws and meeting the requirements of all applicable regulatory authorities.

Demonstrating professional competence and due care. Meeting technical and professional standards relating to their level of qualification, role and position of responsibility. Completing duties with due skill, care and diligence.

Upholding professional standards in all dealings and relationships.

Respecting the confidentiality of information.

Applying objectivity in making professional judgements and in giving opinions and statements, not allowing prejudice or bias or the influence of others to override objectivity.

The code goes on to list specific duties in respect of specific groups:

Customers

Employer/Employee

Regulators and the Law

Community and Public

CII

**This is a significantly edited summary of the Code. Please see CII website for full document.**

## **Information Sources for Members**

**www.cii.co.uk/is or telephone 020 7417 4415 / 16**

Information Services (IS) is a unique source of technical and market information on insurance, risk and related financial services. It is also a gateway to other published material on these subjects, whether online or printed – books, reports, journal articles, websites, online documents etc – underpinned by document delivery, enquiry and library services.

**Knowledge Gateway (Library).** Main catalogue can be searched on-line. It is one of the largest in the world dedicated to insurance, risk and financial services. Lending by post. Documents copied.

**Fact Files** is a series of technical guides written exclusively for the CII by industry experts. Reviewed regularly for currency and updated. The main headings are Law and Regulation, Markets, Management, Underwriting and Claims, The Risk, Special risks, Property, Pecuniary, Liability, Marine, Life, Health and Pensions.

**Market Data** is key data on the UK and international markets, including premium income, number of companies, company rankings, prices, household spending and employment. There is also data on UK insurance salaries.

**News Digest** outlines technical, regulatory and other developments impacting on insurance and financial services.

**Research Centre:** Past research reports and details of research in the pipeline.

**On-line Dictionaries:** Defining and explaining nearly 8,000 terms in insurance, finance and related areas.

**Digital journal archive** allows browsing by subject of recent articles from a range of specialist periodicals. Print or download the full text.

**Global Web Directory** categorises and describes over a thousand websites, focusing on insurance, risk and financial services. The most comprehensive resource of its kind on the web.

## Membership Costs: Fees for 2008-09

### **CII**

Chartered	£163
FCII	£152
ACII	£136
Dip CII	£130
Cert CII (MP)	£115
Cert CII	£102
CII Ordinary	£ 70

### **PFS**

Chartered	£200
FPFS	£165
APFS	£165
Dip PFS	£165
Cert PFS	£165
PFS Student	£ 70

A one-off administration fee (£36) is payable with all applications to join or re-join, in addition to the subscription: except for applications to join PFS as a student..

### **Tax Relief**

CII is an approved professional body by HM Revenue & Customs. If you pay your membership fee from earnings, you can claim tax relief at your highest rate of tax. Example: an ACII taxed at higher rate (40%) can save £54.40.

### **Retired Members Subscription Scheme**

All Members who have retired from active business life may apply for Retired Member's Status at £40 annual subscription (reduced to £20pa if you have been a member for 20 years).

### **Membership Support Scheme**

Members who experience a significant change in personal circumstance should approach the CII. Applications are considered following unemployment, career break, maternity leave, going part-time, long-term ill health or similar circumstance. The two main options are to pay half the membership subscription for a period or resign and re-apply for membership within two years without penalty.

**To Find out More.....**

**The Insurance Institute of Leicester**

For updated information regarding The Insurance Institute of Leicester, please check our website at **[www.ii.org.uk](http://www.ii.org.uk)**. Please bookmark after first visit for direct access in future

Or you can contact our **Secretary – Mary Rogerson:**

Tel: 0116 286 6255 or 07919 693 249  
email: [mary.rogerson@uwclub.net](mailto:mary.rogerson@uwclub.net)  
16 Honeycomb Close, Narborough, Leicester LE19 3PS

If you can help our students, invigilate at exams, help at events or sponsor events, we would particularly like to hear from you.

We can keep in touch with you more easily if your contact details with the CII are up to date. If you have internet access, you can check them yourself at [www.cii.co.uk](http://www.cii.co.uk)

**The Chartered Insurance Institute**

To contact the CII for further information regarding examinations, study courses, or any of the benefits of membership, please contact Customer Service at:

CII Customer Service, 42-48 High Road, South Woodford, London, E18 2JP.

Tel: 020 8989 8464      Fax: 020 8530 3052  
Email: [customer.serv@cii.co.uk](mailto:customer.serv@cii.co.uk)  
Website: [www.cii.co.uk](http://www.cii.co.uk)