

ACSI/MCSI Application Form for The Institute of Certified Investment and Financial Analysts (ICIFA) Members

All questions to be answered and printed in ink and in block capitals.

1. Correspondence details

a. 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 _____

c. Membership Directory:

Opt in Membership Directory

b. Work details

Firm name _____
Job title _____
Department _____
Firm address _____

Postcode _____
Tel. (include country and local code) _____
Email _____

d. Contact information (tick one)

Correspondence to be delivered to: Work Home

2. IntegrityMatters

Obtaining a pass in the CISI's IntegrityMatters is a requirement for CISI membership. For more information please go to cisi.org/integritymatters

I will pass IntegrityMatters to activate my membership

3. Experience

I am applying for: ACSI with less than 3 years industry experience MCSI with 3 years or more industry experience

Please note you will need to submit your application with a copy of your ICIFA membership and qualification certificates. And, if applying for MCSI, you will need to submit a copy of your Curriculum Vitae as a proof of experience.

4. Communication Preferences

Please tell us what information you would like to be contacted about

Study: Qualifications and Pathways Revision tools

5. Disciplinary history (tick one)

- a) 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.
- b) I have entered an Individual Voluntary Agreement (IVA) or equivalent agreement with my creditors or 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
- d) I have been subject to a disciplinary investigation by my firm that has led to disciplinary action being taken against me Yes No

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

6. Declaration

1. 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
2. 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.
3. 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.
4. I know of no reason why I should not become a member

Signature: _____

Date DD/MM/YYYY _____

Name in full: _____

7. Payment *(Please complete as appropriate)*

There is usually a joining fee applicable for CISI membership. **However, the Institute has agreed to waive the joining fee and award an additional 25% discount from the membership subscription fee for ICIFA Members.** The subscription is 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 tick the following box if you are joining between:

ACSI Apr - Jun - KES 9,300 Jul - Sep - KES 7,000 Oct - Dec - KES 4,600 Jan - Mar - KES 11,600 (includes fees for the following year)
MCSI Apr - Jun - KES 13,500 Jul - Sep - KES 10,100 Oct - Dec - KES 6,700 Jan - Mar - KES 16,900 (includes fees for the following year)

we reserve the right to reprice if the currency fluctuates

Please pay via M-Pesa, via Bank Transfer or via Cheque to:

M-Pesa Payment details

Ardipiko Bank details

Ardipiko Cheque payment details.

Lipa na M-Pesa

Account Name: Ardipiko Ltd.

Account Name: Ardipiko Ltd.

Paybill:

Bank Name: Diamond Trust Bank

Bank Name: Diamond Trust Bank

Business #: 565547

Account#:0434565001

Account#:0434565001

Account#: Your Name

Branch: Rivaan Center

Please email this form to:

Customer Support Centre, Chartered Institute for Securities & Investment
CISI.EAC@cisi.org +254 711 400994