

UPDATES TO THE CISI MEMBERSHIP REGULATIONS

A brief summary of the changes between the October 2021 to March 2022 versions can be seen below:

Addition to the Individual Charter CPD requirements criteria

Members holding a CISI Level 6/7 qualification, can use CPD completed as a Chartered Member of a CISI Relevant Body towards meeting their CPD requirements when applying for Chartered Fellowship. Changes are reflected in Annex 1 paragraph 3 to 6.

New Chartered Route – Chartered FCSI (Financial Planning)

A new Chartered FCSI (Financial Planning) Route is now available for members who hold a CISI level 7 Advanced Diploma in Financial Planning. Details on the criteria and the window of opportunity can be found in Annex 1 paragraph 7 to 10.

Disciplinary Sanction

A new sanction, 'expulsion for a period of time', has been added to the Disciplinary sanctions. This will give members receiving this sanction the opportunity to reapply for membership after the timeline of their sanction has ended. This is reflected in 19.1 h Disciplinary Sanctions.

Members to note that these changes may impact the numbering of paragraphs and sections within the Regulations.

Should you have any queries with reference to the changes, please email the Policy Team at policy@cisi.org.