

CISI Chartered Membership via another Chartered body FAQs

1. What is the criteria for Chartered Membership via another Chartered body?

To meet the criteria, you must have been a Chartered member of another FCA-Accredited body with a Royal Charter for at least one year. Your Chartered membership must be in the year immediately preceding your application for CISI membership. You will need to provide written confirmation of your membership history with the relevant Chartered body, this should be included with your application.

2. Which bodies are recognised by the CISI as relevant Chartered Bodies?

- Chartered Insurance Institute (CII)
- The London Institute of Banking & Finance (LIBF)
- Chartered Banker Institute (CBI)

3. If I am a Chartered Member of another Chartered body, how do I submit my CPD records to the CISI?

You do not need to provide evidence of your CPD log upon application, but we reserve the right to audit this in future. You will be required to provide written confirmation of your relevant membership history with the relevant Chartered body.

4. What written confirmation of my membership history should I provide?

You will need to provide any document(s) showing your current membership status with a start date of at least 12 months ago. This could be a document downloaded from your membership portal, an email order confirmation or written confirmation of your membership history provided by the relevant Chartered body.

5. I am a Chartered member based outside of the UK. Can I apply for Chartered Membership with the CISI?

The requirements are the same for all members regardless of whether they are based in the UK or overseas.

6. Is there a fee to apply for Chartered Membership?

Yes; fees can be found [here](#).

7. Do I have to pass the online IntegrityMatters test to become individually Chartered and how much does it cost?

You must pass IntegrityMatters within three months of your application being approved. If you do not successfully pass this within three months, your membership may be suspended. IntegrityMatters is free for CISI members at Affiliate status and above.

8. Does becoming individually Chartered with CISI allow my firm to apply for CISI Chartered Firm™ status?

If you become Chartered with the CISI then your firm can use this to contribute towards the criteria for becoming a CISI Chartered Firm™. This includes a requirement that 50% of your firm's employees are individually Chartered and you would count towards this criteria. The full requirements for becoming a CISI Chartered Firm™ can be found [here](#).

9. If I become a Chartered Member can I upgrade to Chartered Fellow in the future?

If you hold a CISI Level 6/7 qualification and have met the relevant CPD requirements, you will be able to upgrade to Chartered Fellowship in accordance with the table found [here](#).