

PMI ENTRY FORM FOR AUTUMN 2019

The form and payment must be received by the PMI by Monday 29th July 2019 Please
send all application forms to qualifications@pensions-pmi.org.uk



All candidates please complete the information below:

Qualification I am registering for					I am applying as part of an Apprenticeship		
PMI Membership Number (if previously a member):		Title:		First Name:		Surname:	
Home address (including postcode)							
Job Title							
Employer Name:							
Work address (including postcode)							
Daytime Phone Number:				Mobile Phone Number:			
Email address:							

Please complete the information below **ONLY** if you are applying to become a member of the PMI for the first time:

Communication preferences:

Would you like to receive news about PMI?	Yes		No		Mailing Preference	
Address you would like to be used for correspondence (PMI News etc.)	Home			Work		
Do you wish to receive communication from the PMI Regional Groups:	Yes			No		
If yes, please select the Regional Group(s) you wish to be contacted by:						
Eastern		London		Midlands		North East
North West		Scotland		Southern		South West

Please circle where you wish to sit the examination:

Bristol	Belfast	Birmingham	Glasgow	Guernsey	Ipswich	Jersey	Leeds	London	Manchester	Newcastle	Reading	Southampton
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For an approved PMI Centre, please state the Centre name and Number:

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For an overseas centre please state where (£150 supplementary fee incurred)

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I wish to take my examination online (not available in centre – please tick)

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Equal Opportunities

PMI wants to meet the aims and commitments set out in its equality policy. This includes not discriminating under the Equality Act 2010, and building an accurate picture of the make-up of its learners, in encouraging equality and diversity.

Attached to this document is an Equal Opportunities Monitoring Form. PMI needs your help and co-operation to enable it to do this, but stress that filling in this form is voluntary.

Important Information

- Membership of the PMI is on an individual basis and is non-transferable.*
- The membership year runs from 7th September to 31st August (with the exception of Affiliate Membership which runs from 1 November to 31 October and Trustee Group Membership which runs from 1 January to 31 December).*
- The current membership subscription fees due can be found on our website.*
- If you are not already a member of the PMI, please make sure you have completed all of the details on the first page of the form to set up your membership, along with the appropriate subscription fee included on the Payment Form.*
- After payment has been received online learning materials will be made available.*
- Please ensure you have completed the Payment Form to accompany your application.*
- An invoice is available upon request. Please email qualifications@pensions-pmi.org.uk or telephone 0207 392 7400 with details of your request.*

Data Protection

We will process this data under the legal grounds of 'legitimate interests' and 'contract' under the General Data Protection Regulation (GDPR). You can opt out from receiving further marketing communications from us at any time by sending us an email to info@pensions-pmi.org.uk advising us that you wish to opt out. We are committed to GDPR compliance and to following best practice to keep your data secure. Your business contact details are on our marketing database. Full details of PMI Privacy Policy is available on the PMI's website: <https://www.pensions-pmi.org.uk>.

Declaration

I hereby apply for membership/am a member of the Pensions Management Institute and declare that all the information given in this form is correct and that I consent to it being held in accordance with the Data Protection and Privacy Statement. I hereby undertake to observe the Articles of Association, Code of Professional Conduct, Rules and Regulations for the time being in force for the duration of my membership. The Code of Professional Conduct and other relevant documents are published on the PMI website.

Signed:.....

Date:.....

FOR OFFICE USE ONLY

RECEIVED		INVOICE NO.		PAYMENT RECEIVED		MATERIAL SENT	
ENTERED		PAID BY		PAYMENT PROCESSED			

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Certificate in Pensions Administration (CPA), Certificate in Pensions Calculations (CPC) and Diploma in Pensions Administration (DPA) (Available in Centre only)
Please circle the Time of Exam and the Type of Examination e.g. Examination, Re-sit or Revision

Unit	Examination Date	Examination Time	Other Costs	Learning Materials	Examination	
<i>Retirements without Special Circumstances</i>	<i>09/09/2019</i>	<i>13:30 - 16:30</i>	<i>£80 Registration Fee</i>	<i>£95 Access Key</i>	<i>£100</i>	<i>£150*</i>
<i>Retirements with Special Circumstances</i>	<i>10/09/2019</i>	<i>09:30 - 12:30</i>			<i>£100</i>	<i>£150*</i>
<i>Deaths without Special Circumstances</i>	<i>10/09/2019</i>	<i>14:00 - 16:30</i>		<i>£95 Access Key</i>	<i>£100</i>	<i>£150*</i>
<i>Deaths with Special Circumstances</i>	<i>11/09/2019</i>	<i>09:30 - 12:30</i>			<i>£100</i>	<i>£150*</i>
<i>Leavers without Special Circumstances</i>	<i>11/09/2019</i>	<i>14:00 - 16:30</i>		<i>£95 Access Key</i>	<i>£100</i>	<i>£150*</i>
<i>Leavers with Special Circumstances</i>	<i>12/09/2019</i>	<i>09:30 - 12:30</i>			<i>£100</i>	<i>£150*</i>
<i>Transfers In & Transfers Out</i>	<i>12/09/2019</i>	<i>13:30 - 16:30</i>		<i>£95 Access Key</i>	<i>£100</i>	<i>£150*</i>

**Independent Candidate entry*

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Retirement Provision Certificate (RPC), Certificate in DC Governance (DC Gov), Award in Pension Trusteeship (APT) and Certificate in Pension Scheme Member Guidance (CPSMG)								
Please circle the Time of Exam and the Type of Examination e.g. Examination, Re-sit or Revision								
Unit	Examination Date	Examination Time	Other costs	Learning materials	Examination		Re-sit	Revision Course**
<i>Retirement Provision Certificate *</i>	<i>18/09/2019</i>	<i>14:30-16:30</i>	<i>Affiliate membership included in package</i>	<i>Included in package</i>	<i>£460+</i>	<i>£385++</i>	<i>£180</i>	<i>£160</i>
<i>Certificate in DC Governance*</i>	<i>18/09/2019</i>	<i>14:30-16:00</i>			<i>£460+</i>	<i>£385++</i>	<i>£180</i>	<i>£160</i>
<i>Award in Pension Trusteeship*</i>	<i>18/09/2019</i>	<i>14:30-16:00</i>	<i>Trustee Group membership included in package</i>	<i>No study material included</i>	<i>£225</i>		<i>N/A</i>	<i>N/A</i>
<i>Certificate in Pension Scheme Member Guidance</i>	<i>Rolling enrolment process</i>		<i>Affiliate membership included in package</i>	<i>Included in package</i>	<i>£705+</i>	<i>£630++</i>	<i>£165</i>	<i>N/A</i>
<i>+Includes Affiliate Membership ++Price for current members</i>								

* available through online assessment

**courses run for half a day; CUTB and Int- 2 courses are two days

***Should you wish to register, upgrade your membership or reinstate a lapsed membership a £150 election fee will be applied

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Advanced Diploma in Retirement Provision (ADRP), Diploma in Retirement Provision (DRP), Diploma in Employee Benefits and Retirement Savings (DEBRS) and Diploma in International Employee Benefits (DipIEB)							
Please circle the Time of Exam and the Type of Examination e.g. Examination, Re-sit or Revision							
Unit	Examination Date	Examination Time	Other costs	Learning materials	Examination	Re-sit	Revision Course**
<i>Core Unit 1A - Understanding Retirement Provision*</i>	07/10/2019	09:30-11:30	Student membership required £136	Included in package	£425	£205	£160
<i>Core Unit 1B - Foundation in International Employee Benefits*</i>	07/10/2019	09:30-11:30	None		£425	£205	£430
<i>Core Unit 2 - Regulation of Retirement Provision*</i>	07/10/2019	14:00-16:00	Student membership required £136		£425	£205	£160
<i>Core Unit 3 - Running a Workplace Pension Scheme*</i>	08/10/2019	09:30-11:30			£425	£205	£160
<i>Core Unit 4 - Financing and Investing for Retirement Provision*</i>	08/10/2019	14:00-16:00			£425	£205	£160
Specialist Units							
<i>Defined Benefit Arrangements*</i>	07/10/2019	09:30-12:30	Student membership required £136	Included in package	£470	£225	£160
<i>Defined Contribution Arrangements*</i>	07/10/2019	14:00-17:00			£470	£225	£160
<i>Reward and Retirement Provision*</i>	08/10/2019	09:30-12:30			£470	£225	£160
<i>Professionalism and Governance*</i>	08/10/2019	14:00-17:00			£470	£225	£160

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Equality and Diversity Monitoring Form

PMI wants to meet the aims and commitments set out in its equality policy. This includes not discriminating under the Equality Act 2010, and building an accurate picture of the make-up of the workforce in encouraging equality and diversity.

PMI needs your help and co-operation to enable it to do this, but filling in this form is voluntary.

Gender Man Woman Intersex Non-binary Prefer not to say

If you prefer to use your own term, please specify here

Are you married or in a civil partnership? Yes No Prefer not to say

Age 16-24 25-29 30-34 35-39 40-44 45-49 50-54 55-59 60-64 65+
Prefer not to say

What is your ethnicity?

Ethnic origin is not about nationality, place of birth or citizenship. It is about the group to which you perceive you belong.

Please tick the appropriate box.

White

English Welsh Scottish Northern Irish Irish

British Gypsy or Irish Traveller Prefer not to say

Any other white background, please state:.....

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Mixed/multiple ethnic groups

White and Black Caribbean White and Black African White and Asian Prefer not to say

Any other mixed background, please state:.....

Asian/Asian British

Indian Pakistani Bangladeshi Chinese Prefer not to say

Any other Asian background, please state:.....

Black/ African/ Caribbean/ Black British

African Caribbean Prefer not to say

Any other Black/African/Caribbean background, please state:.....

Arab Prefer not to say Any other ethnic group, please state:.....

Do you consider yourself to have a disability or health condition?

Yes No Prefer not to say

What is the effect or impact of your disability or health condition on your ability to give your best at work? Please write in here:

The information in this form is for monitoring purposes only. If you believe you need a 'reasonable adjustment', then please discuss this with your manager, or the manager running the recruitment process if you are a job applicant.

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What is your sexual orientation?

Heterosexual Gay Lesbian Bisexual

Prefer not to say If you prefer to use your own term, please specify here

What is your religion or belief?

No religion or belief Buddhist Christian Hindu Jewish

Muslim Sikh Prefer not to say If other religion or belief, please state:.....

What is your current working pattern?

Full-time Part-time Prefer not to say

What is your flexible working arrangement?

None Flexi-time Staggered hours Term-time hours

Annualised hours Job-share Flexible shifts Compressed hours

Homeworking Prefer not to say If other, please state:.....

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Do you have caring responsibilities? If yes, please tick all that apply

- None Primary carer of a child/children (under 18)
- Primary carer of disabled child/children
- Primary carer of disabled adult (18 and over) Primary carer of older person
- Secondary carer (another person carries out the main caring role)
- Prefer not to say

PAYMENT FORM

Name PMI Member Number

Payment Details

Payment in respect of:	Amount
<input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>
<input type="text"/>	£ <input type="text"/>
TOTAL	£ <input type="text"/>

Payment made by: Company (if so please state) Individual

Payment has been made by:

I enclose a cheque made payable to PMI

OR

I would like to pay by credit / debit card, details are:

Type of card (please tick) Mastercard Visa Debit Card Switch Maestro Amex

Card Number

Start Date / End Date /

3 Digit Security Code (4 digit for Amex only)

Name on Card

Signature

OR

I would like to pay by BACS, details are:

Account Name

PMI bank account details: HSBC Bank plc, 100 Old Broad Street, London EC2N 1BG

Sort code: 40-07-31 Account number: 61146203

(Expected) Date payment made

Please ensure your surname, PMI member number or invoice number is given as a reference on the BACS payment.

If you would like a receipt for this payment please confirm the email address for that receipt below:

FOR OFFICE USE ONLY

PMI Member Number	PMI Company Number	Amount	Date Received
<input type="text"/>	C <input type="text"/>	<input type="text"/>	<input type="text"/>