

Certificate of Professional Achievement (CPA) Application Form

Please save a copy of this form to your computer and complete it on-screen before emailing it to sps@libf.ac.uk
Alternatively, you can print a copy to complete in **BLOCK** capitals and scan and email it to sps@libf.ac.uk or post to
Student and Customer Services, The London Institute of Banking & Finance, 4–9 Burgate Lane, Canterbury, Kent CT1 2XJ United Kingdom

YOUR DETAILS

Membership number (if known) _____ Title (Mr/Mrs/Ms etc) _____

First name(s) / Given name(s) _____

Last name / Family name _____

Previous name (Please tell us any previous name you have used that would help us link this registration to any other records we may hold for you)

Date of birth* (DD/MM/YYYY) _____ Gender Male Female

*A date of birth is compulsory to activate your online account.

CONTACT DETAILS

Email address* _____

Please provide a telephone number we can use to contact you if necessary:

Telephone no. _____ Mobile no. (if different from Telephone no.) _____

*Please note that having a valid email address is a compulsory requirement of using LIBF CPA Services.

EMPLOYMENT

Job title _____

Employer / business name _____

ADDRESS DETAILS

Business address _____

Postcode / Zipcode _____ Country _____

Home address _____

Postcode / Zipcode _____ Country _____

Please indicate which address you would prefer us to use for postal correspondence: Business Home

QUALIFICATION DETAILS

Please indicate which of the following approved Level 4 qualifications you currently hold:

- Diploma for Financial Advisers (DipFA®) – registered after 1 April 2010
- Diploma for Financial Advisers (DipFA®) – registered before 1 April 2010 plus appropriate qualification 'gap-fill' (see guidance note 4c)
- Diploma in Mortgage Advice and Practice (DipMAP®)
- Diploma in Retail Banking Conduct of Business (DipRBCB®)
- Qualification from another provider, please state

If you have answered 'Qualification from another provider' you are required to submit a certified copy of your qualification certificate

Previous SPS - please note that a CPA is not a form of SPS. Practising advisers need an SPS.

USING YOUR PERSONAL INFORMATION

We will use the information you have provided to process your Certificate of Professional Achievement (CPA) application and your membership application, where you have applied for membership on this form.

We may share some of your details with other organisations such as; your employer(s), networks, appropriate Awarding / Accredited bodies and relevant regulator(s) to verify your qualification and any previous SPS; audit your CPD and meet our commitments to maintaining a high level of ethical standards.

You can access information we hold about you, and update that information if necessary, by logging into the secure website www.mylibf.ac.uk.

Additional details of how personal information is used can be found within the data protection / privacy statement on our website (www.libf.ac.uk).

We would like to include your details in our publications and on our website. If you would prefer that we don't publicise your details in this way please tick this box

We would like to send you information about our products and services that may be of interest to you. If you do **not** wish to receive this kind of information, please tick this box

DECLARATION

- I declare that the information contained in this form is true and accurate
- I declare that in the preceding twelve months I have completed a programme of Continuing Professional Development that meets the standards set by The London Institute of Banking and Finance. I will continue to undertake an annual programme of CPD in order to retain the CPA certificate.
- I agree to abide by The London Institute of Banking & Finance **Code of Ethics**.
- I accept the **Terms and Conditions**.

Signed _____ Date _____

PAYMENT DETAILS

- Membership* £44 £ _____
- Non-member £81 £ _____

* If you are not yet a member but would like to become one you can do so by completing the Membership application section at the end of this form.

Your SPS will be available to download (in PDF format) once your application has been successfully processed and is valid for a period of 12 months.

- Please tick here if you would like a paper copy posted to you

£10 £ _____

TOTAL £ _____

- I enclose a cheque for the total payable, made payable to The London Institute of Banking & Finance

- I authorise The London Institute of Banking & Finance to debit my Visa / MasterCard / debit card for the total payable

Card number

Expiry date / Valid from /

Issue number (if applicable) Security number*

Signed _____ Date _____

*This is the last 3 digits found on the signature strip on the reverse of your card.

