

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* £45 £ _____
- Non-member £83 £ _____

* 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

£12 £ _____

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.

MEMBERSHIP

Membership of The London Institute of Banking & Finance provides access to benefits that address the specific needs of the financial and mortgage adviser community. Membership costs £75 per annum.

I would like to apply for membership of The London Institute of Banking & Finance £75

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

Card number Expiry date /

Issue number (if applicable) Security number*

Signed _____ Date _____

I would like to pay monthly installments of £6.25 via direct debit (please complete the direct debit instruction below)

I would like to pay annually via direct debit (please complete the direct debit instruction below)

I would like to pay by cheque (cheque enclosed)

Signed _____ Date _____

DIRECT DEBIT INSTRUCTION FOR MEMBERSHIP (UK BANK OR BUILDING SOCIETY ACCOUNTS ONLY)

Please fill in the form and send to The London Institute of Banking & Finance, 4-9 Burgate Lane, Canterbury, Kent CT1 2XJ



Name(s) of account holders

Bank or building society account number

Branch sort code

- -

Name and full postal address of your bank or building society

To: The Manager Bank/Building Society

Address

Postcode _____

Instruction to your bank or building society to pay by direct debit

Service User No

Reference

Instruction to your bank or building society

Please pay The London Institute of Banking & Finance Direct Debits from the account detailed in this instruction subject to the safeguards assured by The Direct Debit Guarantee. I understand that this instruction may remain with The London Institute of Banking & Finance and, if so, details will be passed electronically to my bank/building society.

Signature(s)

Date

BANKS AND BUILDING SOCIETIES MAY NOT ACCEPT DIRECT DEBIT INSTRUCTIONS FOR SOME TYPES OF ACCOUNT

THE DIRECT DEBIT GUARANTEE (THIS GUARANTEE SHOULD BE DETACHED AND RETAINED BY THE PAYER)

The Direct Debit Guarantee



- This Guarantee is offered by all banks and building societies that accept instructions to pay Direct Debits
- If there are any changes to the amount, date or frequency of your Direct Debit The London Institute of Banking & Finance will notify you 10 working days in advance of your account being debited or as otherwise agreed. If you request The London Institute of Banking & Finance to collect a payment, confirmation of the amount and date will be given to you at the time of the request
- If an error is made in the payment of your Direct Debit, by The London Institute of Banking & Finance or your bank or building society, you are entitled to a full and immediate refund of the amount paid from your bank or building society - If you receive a refund you are not entitled to, you must pay it back when The London Institute of Banking & Finance asks you to
- You can cancel a Direct Debit at any time by simply contacting your bank or building society. Written confirmation may be required. Please also notify us.