

Section One: Personal Details

Full Name:	
Address:	
Phone:	
Mobile:	
Email:	
FSA Registration No.:	

Section Two: Company Details

Company Name:	
Position in company:	
Length position held:	
Company Address:	
Phone:	
Number of Employees:	

Section Three: Company Status

Directly regulated:	
Part of a network	
Other	

Section Four: Financial Qualifications Achieved

Code	Subject	Date Gained	Grade	Refreshed

Section Five: Other Qualifications Achieved

Code	Subject	Date Gained	Grade	Refreshed

Section Six: Areas of Practice (please tick all that apply)

	Sometimes	Often	Main area
Group pensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal pensions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Investment trusts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Unit trusts/ORICS	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mortgages	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Savings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offshore products	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Protection/insurance	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Multi manager funds	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Section Seven: Professional Development

Qualifications you are currently studying (please list all)

Subjects

Qualifications you plan to study

Professional memberships held

Personal/business development memberships held

Section Eight: Additional Comments

Please add any additional notes or comments that you think might be relevant

Please include an up to date CPD log with this application

I confirm that the information I have provided on this form and any supporting documents is correct and complete.

Signed

Date

Please return the form to:

Standards International Limited, 5 The Granary, Fairclough Hall Farm, Weston, Hertfordshire, SG4 7DP

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