



Chartered
Insurance
Institute

Standards. Professionalism. Trust.

Updating your Preferences



Purpose of this guide

This guide will show you how to update your Preferences through the MyCII/MyPFS area of the Chartered Insurance Institute and Personal Finance Society websites.

Why should I update my Preferences?

Nobody likes an overflowing inbox and even more so when it means you miss that important email, update or offer you've been waiting for. It's time to take control.

To make sure we only ever send you emails for the things you are interested in and find relevant, we've created a Preference Centre which allows you to personalise your membership experience.

Our Preference Centre allows you to choose exactly what information you want to receive. In just a few easy steps, you can update your Preferences and enjoy just the things that interest you.

For further information on how we handle your personal information, please visit our privacy notice, cii.co.uk/privacystatement.

Getting started

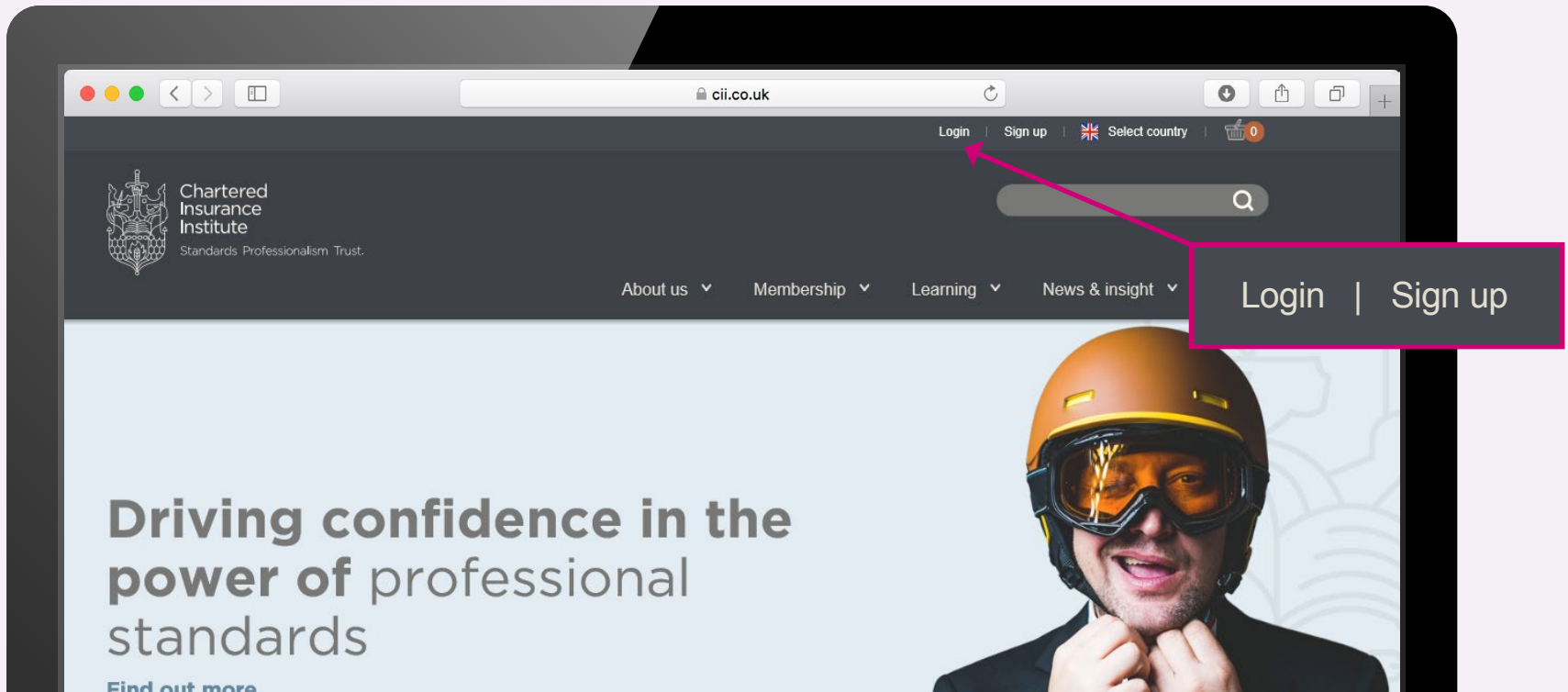
To update your Preferences, head to the website and log in.

To access the Chartered Insurance Institute (MyCII) website go to, **cii.co.uk**.

To access the Personal Finance Society (MyPFS) website go to, **thepfs.org**.

The link to the login page can be found in the top right corner of the homepage.

Please note: The process for logging in and updating Preferences is the same for CII and PFS members. We will now show you the steps you should take to update your details on the CII website. The same steps can be followed on the PFS website.



1. Logging in

To access the Preference Centre you will need to log in. Here's how:

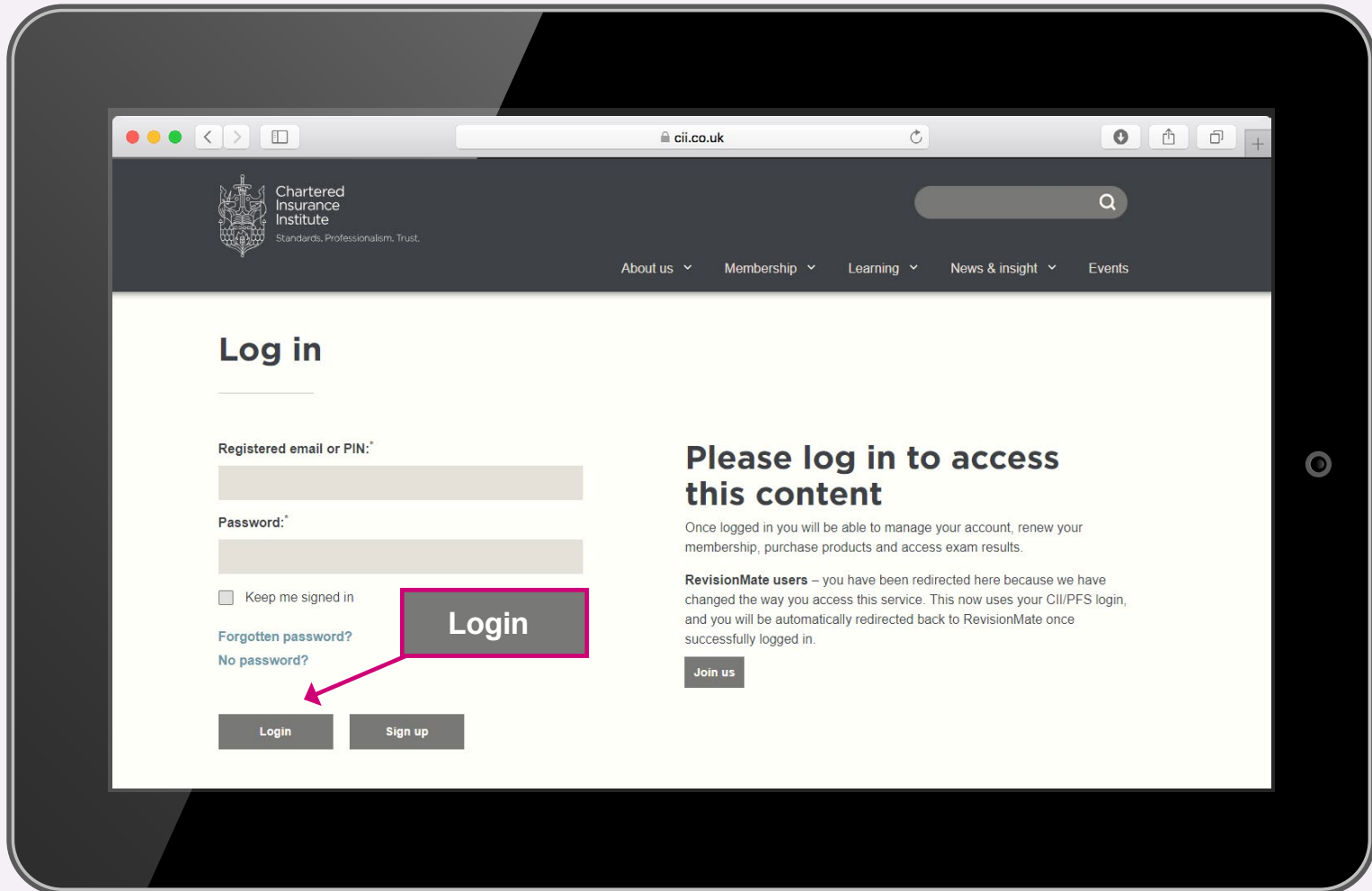
- a. Log in using your PIN/email and password**
- b. Forgot my password - what should I do?**
- c. Forgot my PIN - what should I do?**
- d. Set up an account**



a. Log in using your PIN/email and password

Step 1.

Enter your PIN/email and password. Click 'Login' (go to section 2).



b. Forgot password – what should I do?

Step 1.

To reset your password click 'Forgotten password?'

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Log in

Registered email or PIN:

Password:

Keep me signed in

[Forgotten password?](#)

[No password?](#)

Login Sign up

Forgotten password?

Step 2.

Enter your email and hit 'Submit'. You will be sent an email with a verification link. Click on the link.

Forgotten your password?

If you are a returning customer and you have lost your password please enter your registered email address below. An email will be sent to this address with a verification link back to the CII web site. You will then be prompted for your PIN and invited to enter a new password.

Submit Submit

Step 3.

Now, enter your PIN number and create a new password. Click 'Submit' (go to section 2).

Reset Password

Please enter your PIN

Please choose a password

Confirm new password

New Password

Please choose a new password of 6 or more characters with a mixture of numbers and letters.

Submit Submit

c. Forgot PIN - what should I do?

To find out your PIN number or to request a new PIN you will need to contact our Customer Service team. Please call or email:

Chartered Insurance Institute

Email: customer.serv@cii.co.uk

Tel: +44 (0)20 8989 8464

Personal Finance Society

Email: customer.serv@thepfs.org

Tel: +44 (0)20 8530 0852

Please note: To confirm your identity Customer Services will be required to ask you a number of security questions when you request your PIN. These questions will relate to the personal details you supplied and your record with the Chartered Insurance Institute. For example, they may ask for your date of birth, email, address or information relating to exams you have taken with us. Please have this information to hand when you contact the team.



d. Setting up an account

Step 1.

To set up an account click 'No password' on the login screen.
You will be directed to a new page.

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Log in

Registered email or PIN:*

Password:*

Keep me signed in

[Forgotten password?](#)

[No password?](#)

Login Sign up

No password

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No Password?

Please enter your PIN

Surname

Date of Birth

1 / Jan / 2008

Submit Submit

Step 2.

Enter your;

- PIN
- surname
- and date of birth.

Click 'Submit' (go to section 2).

You will be required to create a password to allow you to log in to the site in future.

2. Your profile

Now you are logged in, you can manage your Preferences, check and update your personal information, view your bookings, access your exam results and much more.

To update your Preferences click 'Manage my preferences':

The screenshot shows a web browser window displaying the CII user profile page. The browser address bar shows 'cii.co.uk'. The page header includes the CII logo, the text 'Chartered Insurance Institute', and a welcome message 'Welcome Mr John Smith | My CII | Log out'. A search bar with 'Advanced search' is also present. The main navigation menu includes 'Chartered', 'Membership', 'Qualifications', 'Training', 'Corporate', 'Knowledge', 'Consumer', 'Events', and 'Careers'. Below this, there are links for 'Bookings and results', 'Request learning statement', 'Knowledge Activities', and 'Update Your Details'. The main content area is titled 'User Profile details' and shows the name 'Mr John Smith'. The profile details are organized into three columns:

PIN: 001234567ABC	Daytime Tel: ext: 12345	Current status: Member
Date of birth: 1 February 1995	Mobile:	Local institute: LONDON
Employer: Premier Insurance	Email: j.smith@email.com	Faculties:

Below the profile details, there is a 'Job title:' section with an 'Edit my details' button. A red box highlights the 'Manage my preferences' button, with an arrow pointing to it from a larger red box labeled 'Manage my preferences'. A 'Show more' link is visible below the profile details. A text box on the right side of the page contains the following text: 'If you are currently a CII member (Status shown above), our records indicate that your membership is not yet due for renewal. You will be issued with a subscription notice approximately four weeks prior to your subscription due date at which time you will be able to renew your membership online here.'

At the bottom of the page, there are two buttons: 'Bookings and results' and 'Manage my CPD'.

3. Selecting your Preferences

Welcome to the Preference Centre.

Tell us exactly what you want to receive by selecting the boxes you would like us to send you information on. Once you have chosen, click save. Your updates will be effective within one business day.

Please note: If you choose not to receive marketing communications, you will still receive transactional communications relating to your membership, qualifications, events bookings and voting rights, as well as important operational notifications relating to the Chartered Insurance Institute.

The screenshot displays the 'Communication Preferences' page on the Chartered Insurance Institute website. The page is titled 'Communication Preferences' and includes a welcome message for Mr. John Smith. It is divided into several sections, each with a 'Select none' link and a 'Save' button at the bottom.

- My Membership:** Includes options for 'Receive all communication' (checked), 'Member updates/news' (checked), 'CPD updates' (checked), 'Society/Faculty newsletter' (checked), 'Journal Xpress' (checked), 'Personal Finance Professional newsletter' (checked), 'My SMP' (checked), 'Perks affinity benefits' (checked), 'Job site' (checked), and 'yourmoney' (checked).
- Membership Magazines:** Includes 'The Journal' (radio buttons for Email, None) and 'Personal Finance Professional' (radio buttons for Email, None, Paper).
- Events:** Includes 'Receive all communication' (checked), 'CPD and networking events' (checked), 'Awards and social events' (checked), and 'CI/PFS event news/updates' (checked).
- Study:** Includes 'Your qualification - updates' (radio buttons for Email, Paper, None), 'New qualification/learning route changes' (radio buttons for Email, Paper, None), and 'Revision courses' (radio buttons for Email, Paper, None).
- Research and Thought Leadership:** Includes 'Research and reports' (radio buttons for Email, None), 'Policy updates' (radio buttons for Email, None), and 'Government and regulator engagement' (radio buttons for Email, None).
- Local Institutes:** Includes 'CPD events' (radio buttons for Email, Paper, None), 'Networking and social activities' (radio buttons for Email, None), 'Local institute news and updates' (radio buttons for Email, Paper, None), and 'AGM notices' (radio buttons for Email, Paper).
- PFS Regions:** Includes 'CPD events' (radio buttons for Email, Paper, None), 'Networking and social activities' (radio buttons for Email, None), 'PFS regions news and updates' (radio buttons for Email, None), and 'AGM notices' (radio buttons for Email, Paper).

4. Changing your Preferences

You can update or change your Preferences at any time by logging in to MyCII/MyPFS.

Don't forget to keep your personal contact details up to date to ensure we continue to send the emails you have selected to the right place.

5. Who to contact for assistance

If you need help with Preferences, or have any other questions about your membership, please get in touch with our Customer Service team.

Contact details:

Chartered Insurance Institute

Email: customer.serv@cii.co.uk

Tel: +44 (0)20 8989 8464



Personal Finance Society

Email: customer.serv@thepfs.org



Tel: +44 (0)20 8530 0852

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London E18 2JP

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