



Chartered  
Insurance  
Institute  
Standards. Professionalism. Trust.

# Membership: Downloading your membership certificate

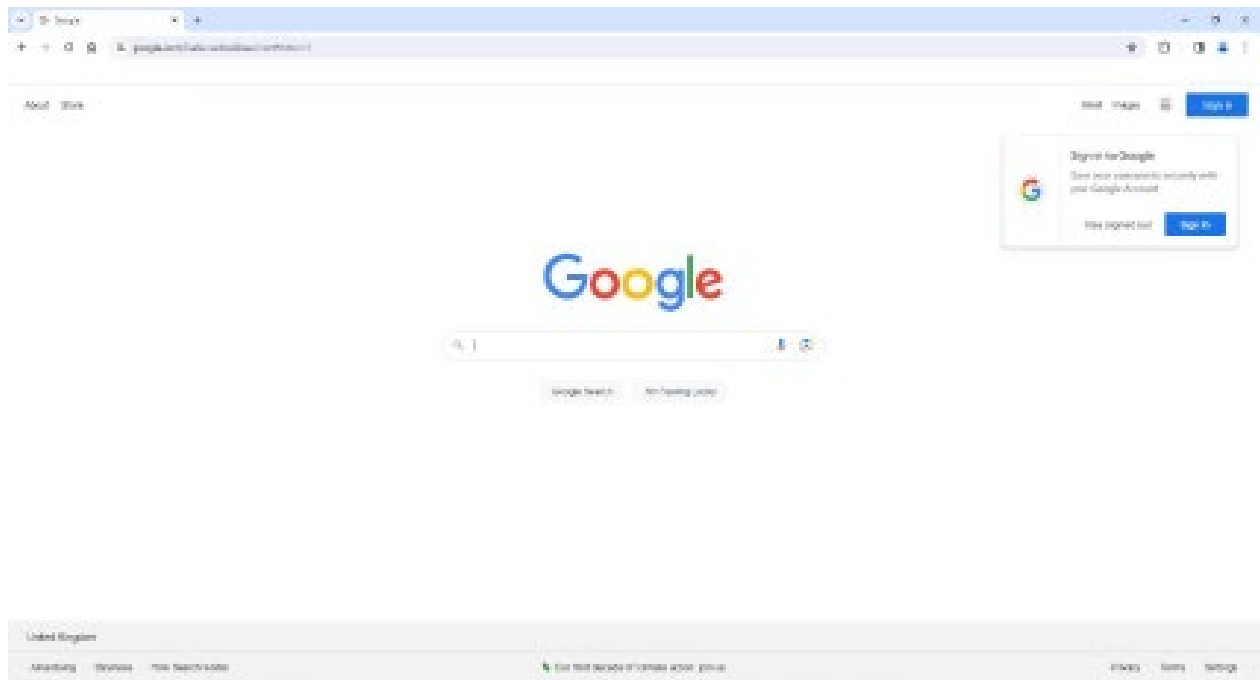
**Step by step guide | Member Series**

## How to download your membership certificates from your CII/PFS dashboard.

This guide explains how to download your membership certificate from your CII/PFS dashboard. You can also access your examination certificates by following the steps below.

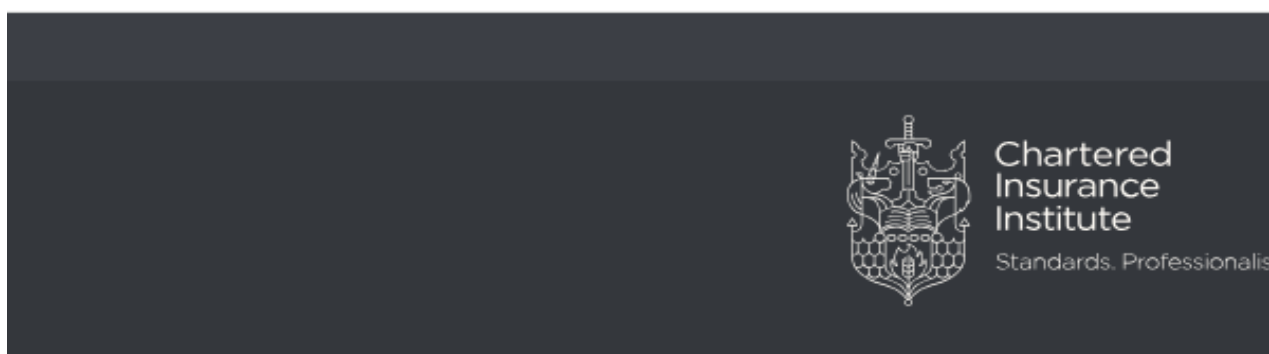
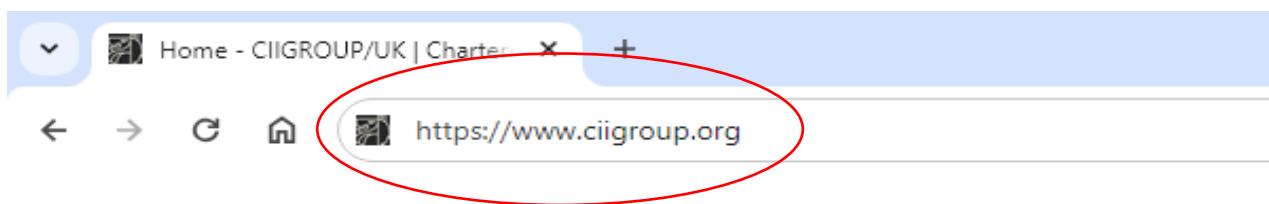
1. Begin by launching your preferred internet browser on your device.

Note: For optimal performance, we recommend using Google Chrome.

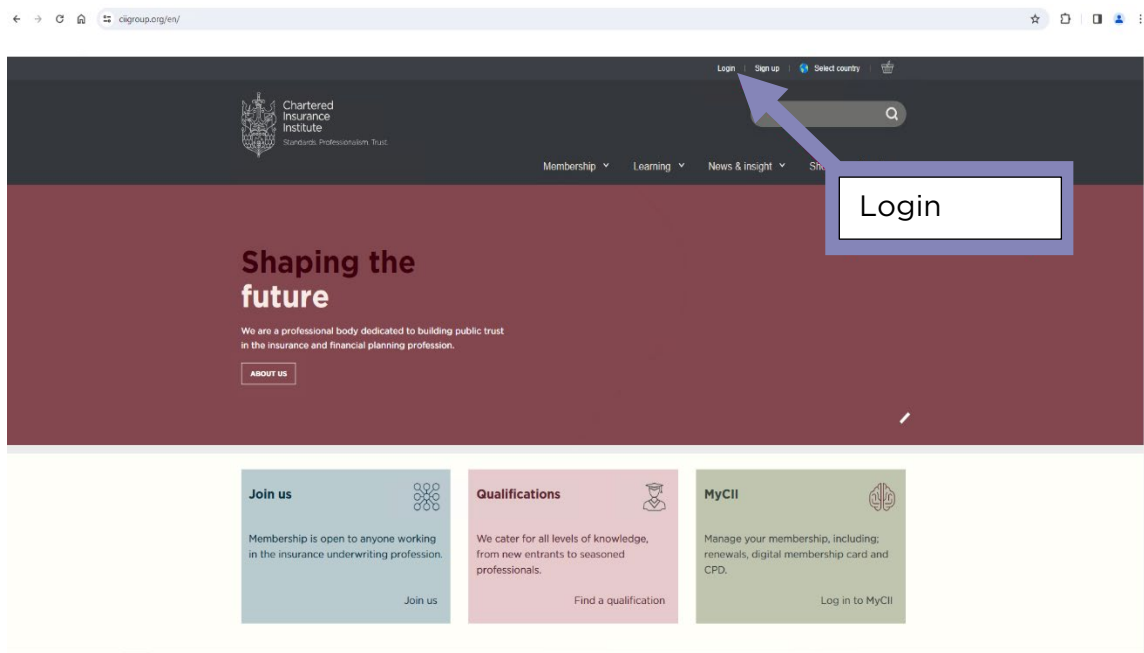


2. To access the Chartered Insurance Institute (My CII) website go to, [www.ciigroup.org](https://www.ciigroup.org).

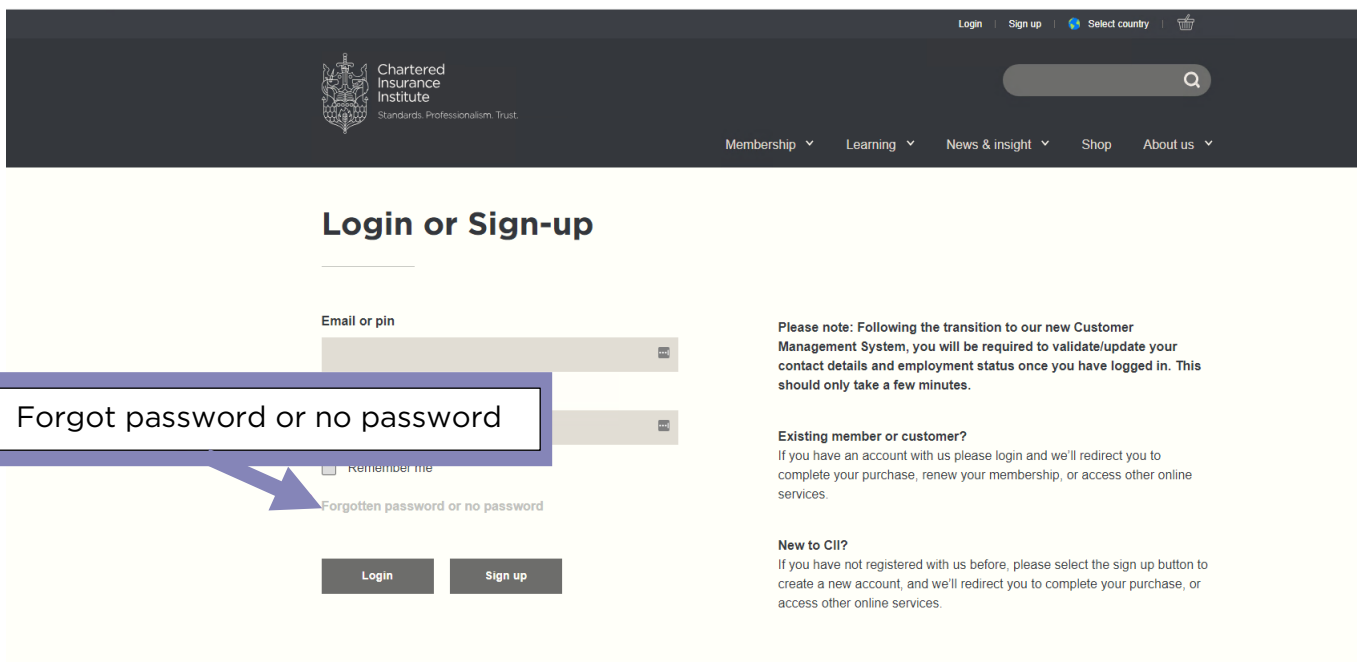
To access the Personal Finance Society (My PFS) website go to, [www.thepfs.org](https://www.thepfs.org)



3. Once the webpage has loaded, click 'Login' on the top right-hand sided

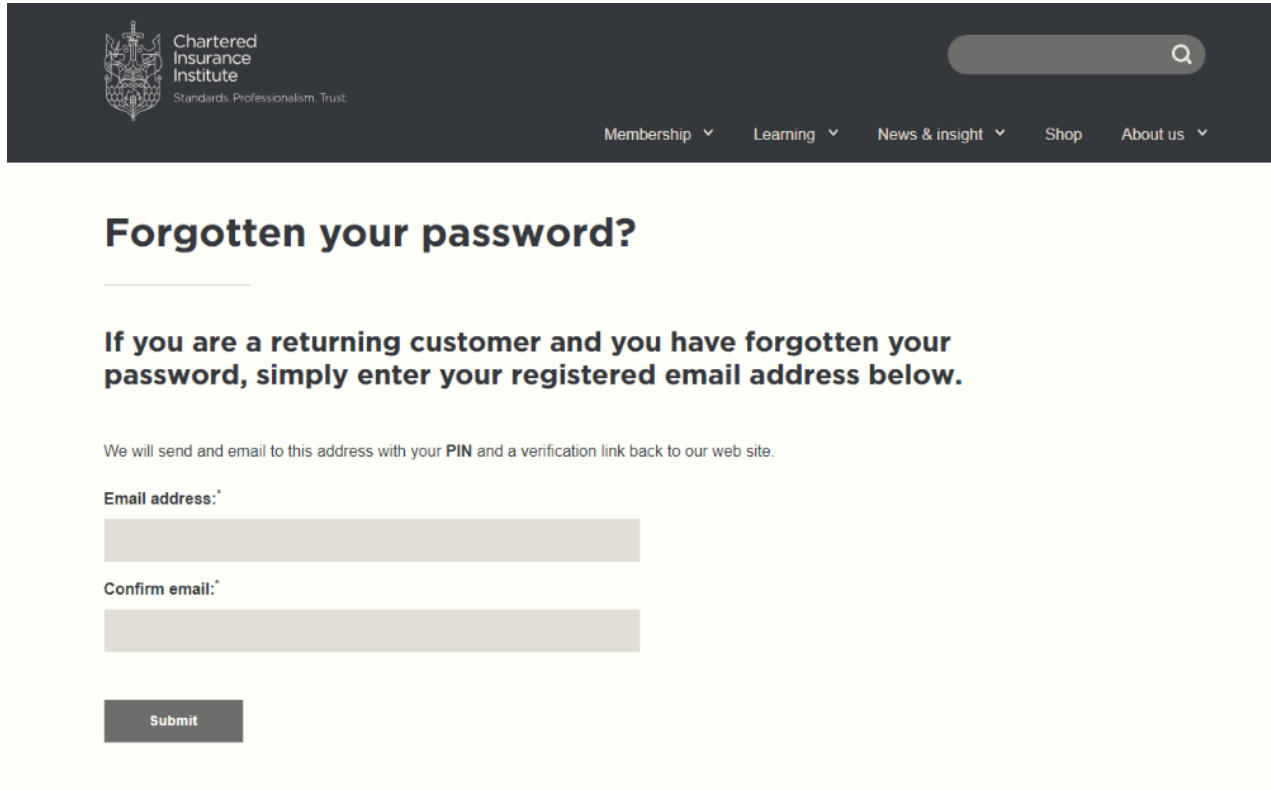


4. If you haven't logged in to your dashboard before you will need to select 'Forgotten



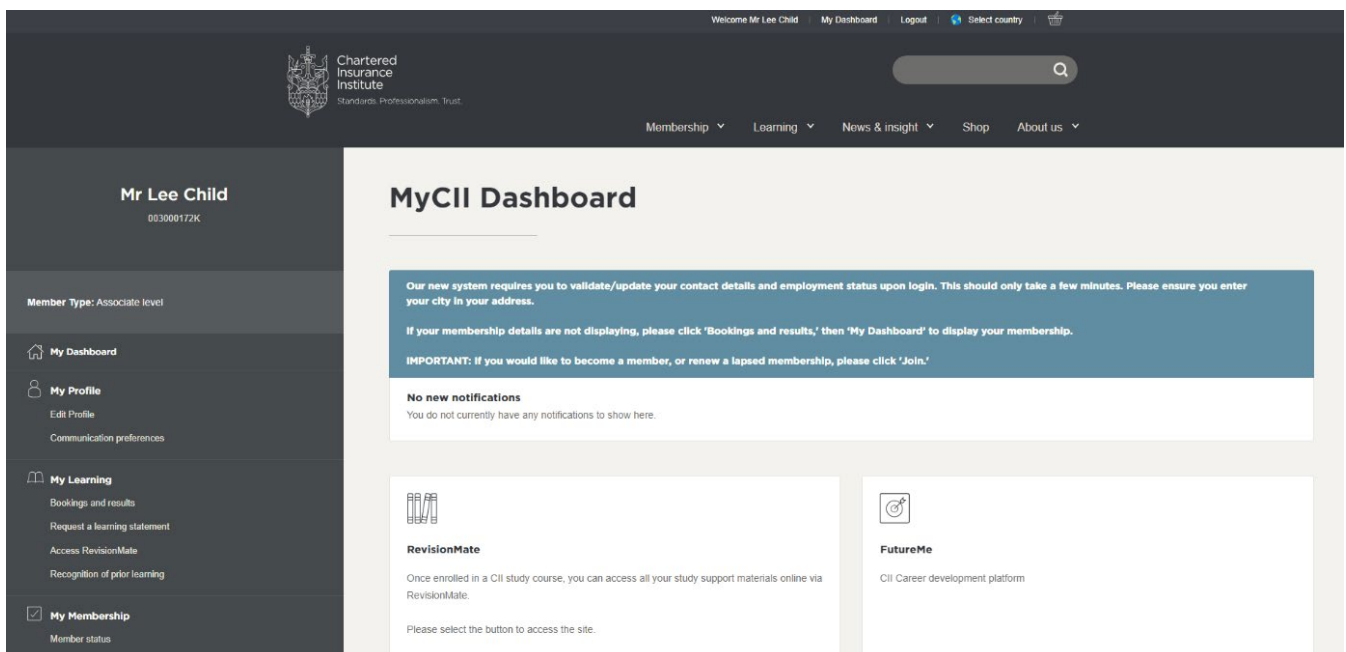
password or no password' section at the bottom of the login screen. If you have an account set up, log in and then skip to point 7.

5. You should now see the screen below. Please enter and confirm your email address and click 'Submit'. You will receive an email with a verification link. Click the link and follow the steps to set up a password.



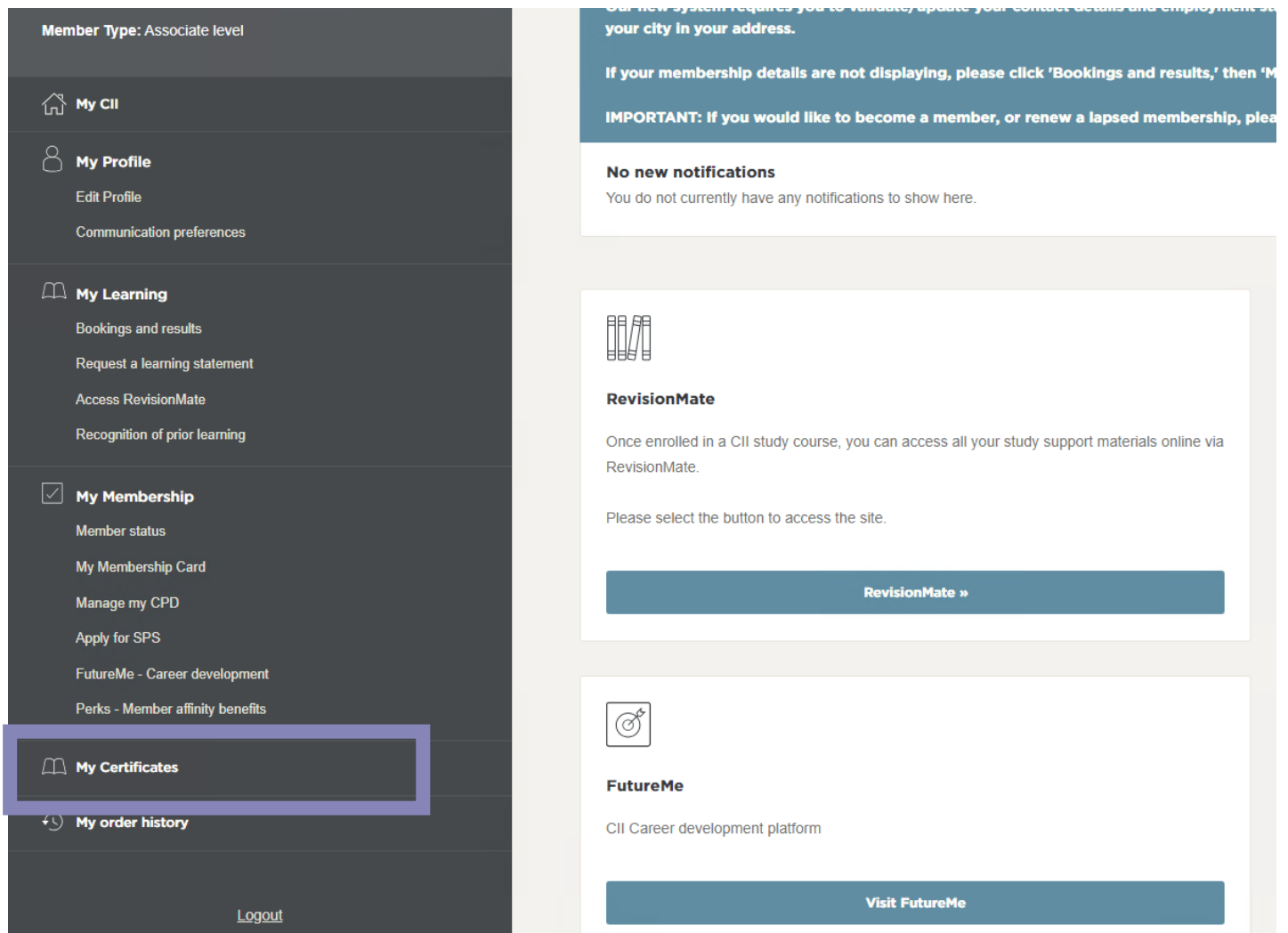
The screenshot shows the Chartered Insurance Institute website's password recovery page. The header includes the logo and navigation links: Membership, Learning, News & insight, Shop, and About us. The main heading is "Forgotten your password?". Below it, a message states: "If you are a returning customer and you have forgotten your password, simply enter your registered email address below." A sub-message says: "We will send an email to this address with your PIN and a verification link back to our web site." There are two input fields labeled "Email address:" and "Confirm email:". A "Submit" button is located at the bottom of the form.

6. Once you've set up a password, log in to the website using your PIN or email and password. Now you are logged in you should see the Member Dashboard.



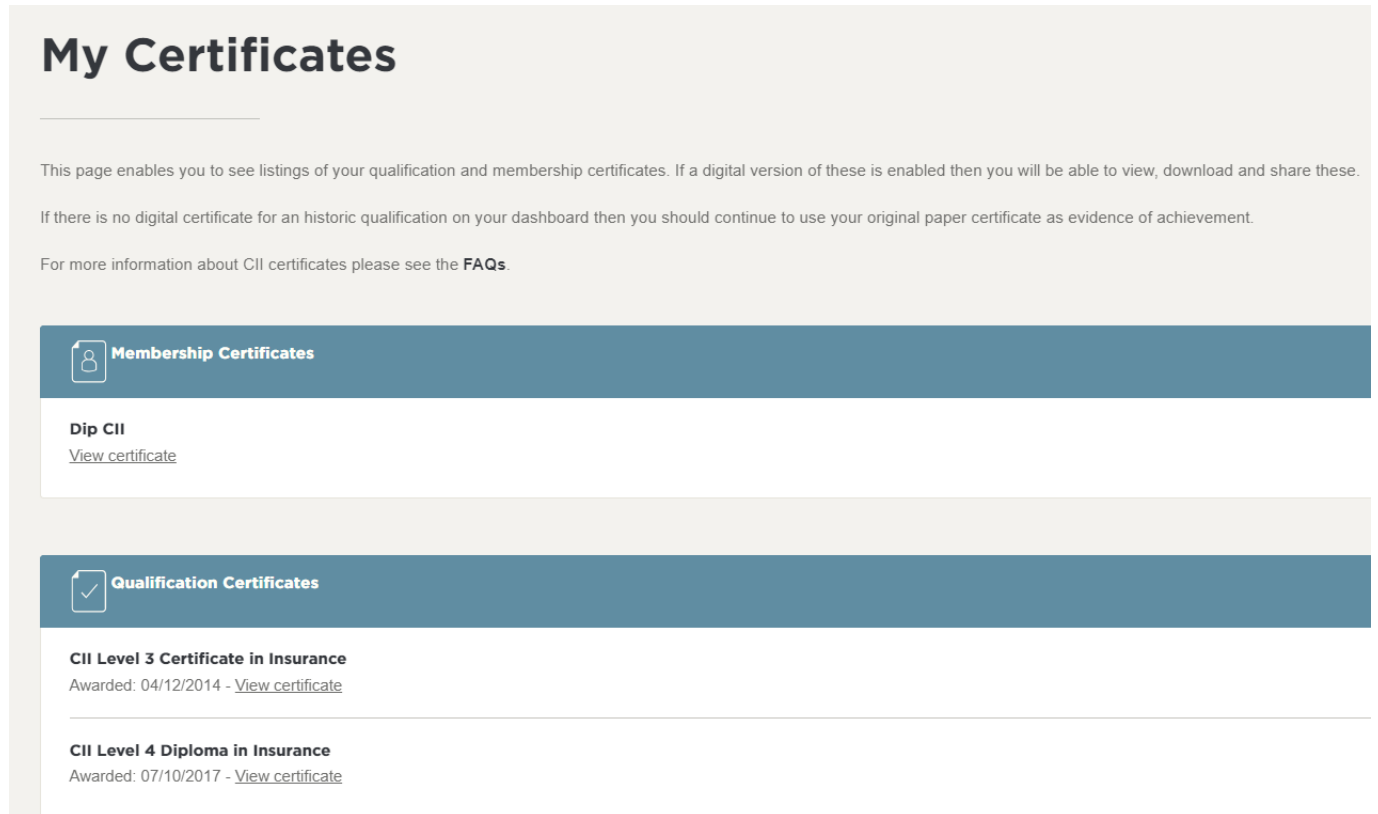
The screenshot shows the Chartered Insurance Institute Member Dashboard for Mr Lee Child. The header includes the logo and navigation links: Membership, Learning, News & insight, Shop, and About us. The user's name "Mr Lee Child" and ID "003000172K" are displayed. The dashboard is divided into several sections: "Member Type: Associate level", "My Dashboard", "My Profile" (with links for "Edit Profile" and "Communication preferences"), "My Learning" (with links for "Bookings and results", "Request a learning statement", "Access RevisionMate", and "Recognition of prior learning"), and "My Membership" (with link for "Member status"). A prominent blue notification box states: "Our new system requires you to validate/update your contact details and employment status upon login. This should only take a few minutes. Please ensure you enter your city in your address." Below this, it says: "If your membership details are not displaying, please click 'Bookings and results,' then 'My Dashboard' to display your membership." and "IMPORTANT: If you would like to become a member, or renew a lapsed membership, please click 'Join.'" A "No new notifications" section indicates "You do not currently have any notifications to show here." The dashboard also features two main content areas: "RevisionMate" (with a book icon) and "FutureMe" (with a target icon). The RevisionMate section includes the text: "Once enrolled in a CII study course, you can access all your study support materials online via RevisionMate." and "Please select the button to access the site." The FutureMe section includes the text: "CII Career development platform".

7. On the left-hand side of the screen there will be a menu to navigate the dashboard. On this menu you will need to locate and click the section called 'My Certificates'.



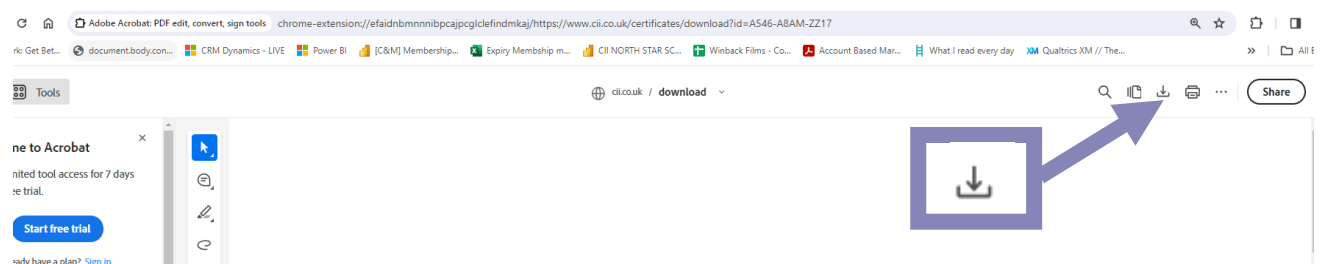
8. Your certificate will load on the right-hand side of the screen. From here you will be able to see your membership or examination certificates.

To download your certificate, click the 'View certificate' link under the membership designation or qualification name.



9. This will open the certificate in a new browser. You can now download your certificate using the 'download' arrow which can be found in the top right if using chrome.

The download will appear in your downloaded in window explorer.



# Getting in touch with us

If you have any questions or issues regarding this process or your membership, please contact us on the details below.

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