Chartered Banker

Professional Mortgage Adviser (PMA) **Application Form**

Accurate completion of all relevant sections of this form will ensure the swift processing of your application. Please take a moment to ensure you have completed all the required information before submitting.

If you already hold the Mortgage Advice and Practice Certificate (MAPC) or equivalent, you can join the Institute as a Professional Mortgage Adviser (PMA) member. You will benefit from joining an organisation committed to professionalism by displaying the Professional Mortgage Adviser logo and designation. And you can enjoy all the other major benefits that our Certificated level of membership brings.

Section 1 – Personal Details

Surname _____ Title _____

Forename(s) _____ Date of Birth _____

Institute Membership Number (if applicable)* _____

*If you have completed an Institute qualification you will have an existing membership/registration number.

Section 2 – Professional Declaration

- I agree to be bound by the Rules and Regulations of the Chartered Banker Institute, including the Code of Professional Conduct.
- I understand that you will use the information I have provided to process my Certificated membership application and to provide ongoing services.
- I understand that by completing this application I am agreeing to complete the annual continuing professional development (CPD) requirements of the Chartered Banker Institute in order to maintain my PMA status.
- I understand that should I be requested to; I am required to submit my CPD activity in accordance with the Chartered Banker Institute's CPD monitoring scheme.
- The information I have provided is true to the best of my knowledge and belief.

Signature _____ Date _____

□ If you completed the equivalent of the Mortgage Advice and Practice Certificate with another Awarding body, please tick here to confirm you have enclosed a copy of your certificate.

Section 3 – Data Protection

The Chartered Banker Institute aims to maintain all personal records accurately and securely to a reasonable standard.

We will use the information you have provided to process your application for PMA status and to provide ongoing services. Full details of the Institute's Privacy Policy are available on our website at https://www.charteredbanker.com/the-institute/privacy-policy.html

Section 4 – Qualifications Held

Name of Appropriate Qualification Held _____

_____

Awarding Body (if not the Chartered Banker Institute) _____

_____

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Section 5 – Contact Details

Job Title _____

Employer _____

Work Address _____

_____

Postcode _____ Contact Phone No. _____

Work Email Address _____

Home Address _____

_____

_____

Postcode _____ Contact Phone No. _____

Home Email Address _____

Preferred Mailing Address (please indicate 'Work' or 'Home') _____

Section 6 – Payment Details

Please tick the appropriate box below.

□ **I will continue to pay by Direct Debit** □ **I have set up a new Direct Debit** □ **I will make payment online**

To set up a new Direct Debit or to pay the membership fee online, please follow these steps:

- 'login' to our website (www.charteredbanker.com) and click 'My Member Area' at the top right-hand side of the screen
- from the drop-down menu select 'My Subscriptions', which will show you information on your membership subscription
- select a payment option.

Please note:

- If you are currently paying an annual subscription, you are not required to pay another.
- Due to new processes introduced in response to the Covid-19 pandemic, we are no longer able to accept payment by cheque.

Please email the completed form to: qualityandstandards@charteredbanker.com