



# FELLOW OF CSI (FCSI®) LICENSE RENEWAL APPLICATION

Please complete and upload or mail form to CSI:

Address: 200 Wellington Street West, 15th Floor  
Toronto, ON, M5V 3C7

You may also apply online at [www.csi.ca](http://www.csi.ca)

Online applications will calculate the appropriate taxes and/or discounts where applicable.

**PERSONAL INFORMATION \*\*\*Mandatory Information\*\*\*** (Please use CAPITAL letters.)

Student Number:

Identity Verification:  
Birthdate (yyyy/mm/dd):

First Name:

Last Name:

Gender:  Female  Male  Non-Binary

Language preference for communication:  English  French

Preferred Email Address:

Alternate Email Address:

Home Telephone:

Business Telephone:

**BUSINESS ADDRESS** (If applicable: Branch Transit Number:  Employee Number: )

Job Title:  Employer:

Street Address:  Suite/Floor:

City:  Province:  Country:  Postal Code:

**HOME ADDRESS**

Street Address:  Suite/App:

City:  Province:  Country:  Postal Code:

**NOTE:** Please be sure to update your online profile for the FCSI® Directory.

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**FCSI® DECLARATION AND SIGNATURE OF APPLICANT**

I declare that I have completed this application as completely as I am able and I hereby apply for the renewal of the FCSI® License.

I confirm that:

**INDUSTRY CONTRIBUTION REQUIREMENTS**

I understand, and agree to comply with the FCSI® Industry Contribution Requirements to complete a minimum of 12 hours per calendar year as set out in Maintaining your FCSI® on [www.fcsi.ca](http://www.fcsi.ca).

*You are not required to submit your documentation on an annual basis, however from time to time some members may be subject to random audits.*

**CODE OF ETHICS**

I understand that this application will be subject to the procedures set out in the FCSI® Code of Ethics and Ethical Misconduct Process.

**FIT AND PROPER REQUIREMENT**

Have you ever been accused of professional misconduct, disciplined or reprimanded by, or had a licence suspended or revoked by, an employer, professional association or administrative or regulatory authority (i.e. securities commission, law society, real estate association, IIROC, MFDA, Insurance Regulator, FINRA, etc.)?  Yes  No

Are you currently bankrupt or have you at any time in the past 5 years been adjudged bankrupt?  Yes  No

Have you ever been convicted of a criminal offence\* in any jurisdiction for which a record suspension or a pardon has not been granted?  Yes  No

Have you ever been convicted of an offense under any financial services or consumer protection legislation in any jurisdiction (i.e., laws regulating the sale of securities, insurance, real estate, mortgages, etc.)?  Yes  No

If you have answered "Yes" to any of the questions above, please attach all relevant paperwork, including details of any punishment or disciplinary action taken. Any information you provide will be collected, stored and used in accordance with applicable law and our privacy policy and will be shared with the Designation Ethics Committee to determine your suitability for the designation.

\* "Criminal offence" excludes an offence (i) under a provincial regulatory statute, such as the Highway Traffic Act, unless the provincial statute is specifically listed above and unless the provincial conviction involved an offence of dishonesty or theft, such as perjury or subornation of perjury, false statement, fraud, embezzlement, or false pretense, or any other offense the commission of which involves some element of deceit or untruthfulness, and (ii) an offence punishable by summary conviction only that is not an offence of dishonesty or theft.

**TRADEMARK LICENSE AGREEMENT**

I understand that CSI grants me license to use the FCSI® Trademark for a one-year term and that if I do not renew my FCSI® license, CSI will terminate my license to use the FCSI® Trademarks.

Signature of applicant: \_\_\_\_\_ Date of application: \_\_\_\_\_

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## PAYMENT METHOD

All fees are in Canadian funds and can be paid by money order, certified or corporate cheque. Please make money orders, certified or corporate cheques payable to Canadian Securities Institute. CSI cannot process forms received without payment information or proper payment.

**NOTE:** All fees are taxable as well as non-refundable. Please refer to [https://www.csi.ca/student/en\\_ca/student/policies/fees.xhtml](https://www.csi.ca/student/en_ca/student/policies/fees.xhtml) – *Tax Information*

**IMPORTANT:** Please include: Annual Licence Renewal Fee \$275.00.

**If you hold 2 or more of these CSI Designations (FCSI®, CIWM, PFP®, CIM® or MTI®) in good standing, you may be entitled to a discount:**

Number of CSI Designations you hold in good standing	1	2	3	4
Discount per designation	\$0	\$50	\$100	\$150
COST PER DESIGNATION <i>after</i> the discount	\$275	\$225	\$175	\$125

**Late renewals, if done within 12 months of your licence renewal date, are subject to a Late Fee of \$50.**

If you have not renewed within 12 months of your license renewal date, you will be required to pay a late fee of \$50, a reinstatement fee of \$275 and the standard annual licence renewal fee of \$275. You will also be asked to prove completion of your CE requirements for all the years of non-renewal. This will require you to submit transcripts showing course completion dates as well as course outlines.

I am paying with a:  Money Order  Certified Cheque  Corporate Cheque, in the amount of: \$ \_\_\_\_\_

Please charge my:  Corporate Customer Account Number (Only if payer is employer) No: \_\_\_\_\_ \$ \_\_\_\_\_

I have submitted my payment online

I am aware that I must upload this form and supporting documentation (if applicable). I understand that my request must be approved before my fees will be processed. I am also aware that I may be contacted for a reinstatement fee if I have not renewed within 12 months of my license renewal date.

**IMPORTANT: As required by Payment Card Industry (PCI), CSI is unable to accept forms (with payment) received by email.**

**Forms received with credit card information via email will be deleted immediately.**

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