



# Are you looking for qualification support and motivation?



The Insurance  
Institute of London  
Chartered Insurance Institute

Qualification Mentoring  
Scheme 2023 intake

[iilondon.co.uk](http://iilondon.co.uk)

[cii.co.uk](http://cii.co.uk)

“The CII is here to build public trust”

“For London to retain its crown as Europe’s dominant insurance and financial services centre, it is vital the profession continues to attract, develop and retain talent.”

Alan Vallance  
CEO, The Chartered Insurance Institute

“Curiosity and learning are critical for success, and the CII qualifications provide a great opportunity to advance our knowledge and enhance the reputation of the London Market.”

Christopher Lay ACII  
President, The Insurance Institute of London

# Where did this scheme come from?

For the public and global corporates alike, trust is vital. We need to earn that trust by getting professionally qualified, committing to continuing personal development and working to high ethical standards. The IIL initially established a three-year Qualification Mentoring Pilot Scheme in 2016 to support students who can't otherwise access an employer mentoring scheme or who may require additional support. Following the success of the pilot years the continuation of the scheme has now been approved by the IIL Council. It is one of the IIL's contributions to the London Market Group's Talent and Diversity drive to help ensure that the London Market has a well-qualified workforce and London retains its global reputation as the centre of excellence in insurance.

The scheme takes a peer-led, team-based approach to encourage and support members in achieving the Advanced Diploma in Insurance (ACII) or the Advanced Diploma in Financial Planning (APFS) – over the course of three years, from any starting point, to reach their full potential.

## How does the scheme work?

This scheme is now open for applications to join the 2023 intake.

- There are 40 Mentee and 12 Buddy Mentor places available (eight Mentee and two Buddy Mentor places are for financial planners).
- We promote a 'team' structure – five teams with two Buddy Mentors and eight Mentees per team. Wider communication across teams is also highly encouraged, to share knowledge and experiences.
- The scheme includes several educational, motivational and networking events per year, to promote networking within the profession and to develop other critical professional skills (see page 6).

## Acknowledgements

The Insurance Institute of London thanks all those individuals and firms who freely give time, expertise and resources to enable us to deliver this Scheme free of charge. These partners are committed, and applicants must also demonstrate their commitment to achieving the Advanced Diploma in Insurance (ACII) or Advanced Diploma in Financial Planning (APFS) within three years, with the support of this scheme.

### Glossary

#### **BM** Buddy Mentor

A member in London, who qualified at Advanced Diploma level (ACII or APFS) in 2016 or later.

#### **M** Mentee

A member in London, committed to achieving the Advanced Diploma in Insurance or the Advanced Diploma in Financial Planning over three years.

#### **CM** Committee Member

A member of the Committee.

# Information for Mentees

## Why join this qualification mentoring scheme?

Studying can be a lonely experience. It can be daunting to study on top of a busy job and active social life. Some find the array of subjects confusing when it comes to deciding the order in which to take them, others have previously found the step up from Certificate to Diploma level bigger than they were expecting and members can also struggle due to a lack of employer support. This scheme aims to provide motivation, via a peer group led by a Buddy Mentor – someone who has recently qualified themselves so has fresh first-hand experience of the challenges you will face.

### Benefits include:

- Access to Buddy Mentors who are familiar with the stresses and strains.
- Support with learning and assessment challenges, for example, how best to group subjects together to maximise the credits from your studies.
- Time management, work/study planning and examination/assignment techniques are all useful life skills as well as being essential for examination success. Get top tips from expert tutors, who have business experience themselves.
- Tried and tested content from the Chartered Insurance Institute and Insurance Institute of London (IIL), with a logical scheme structure, experienced presenters plus contacts who can give you extra support.

## How to apply

Please complete the application form on page 7 and email it together with your CV to [gemma.warren@cii.co.uk](mailto:gemma.warren@cii.co.uk)

“Being part of the mentoring scheme has helped me to stay motivated and meet others in the industry who are in the same position as me. We are all trying to achieve a goal and to be able to discuss ways we can help each other is priceless.”

Nadia Khan DipPFS Cert CII (MP)  
Independent Financial Adviser  
Fairstone Financial Management Ltd

## Next steps

If you would like to find out more about our programme, we will be holding a virtual introductory session on Monday 31 October 2022 at 13:30-14:30. This session will provide an opportunity for you to hear first-hand from a current Mentee, Buddy Mentor and Committee Members. To reserve your place, please book online at [iilondon.co.uk](http://iilondon.co.uk) before Friday 28 October 2022.

## The fine print - this scheme isn't

- An ‘easy option’ with all the work done for you! The Buddy and Advocate Mentors provide their time for free and the onus is on you, the Mentee, to drive the relationship.
- A ‘one-to-one’ career/personal coaching programme. If you are looking for career coaching, please see [www.cii.co.uk/connect](http://www.cii.co.uk/connect)
- A mechanism for advice on specific assessments or technical learning issues.
- A magic solution if you don't study or participate. You will still need to do the work, contribute, share and give feedback.
- A prison sentence! This is a three-year commitment. We want you to succeed but appreciate that circumstances change. If you cannot continue to participate or if you experience a problem in your Mentee Group such as compatibility with fellow Mentees or Buddy Mentor, just let us know by emailing [gemma.warren@cii.co.uk](mailto:gemma.warren@cii.co.uk)

Full joining terms and conditions can be found on page 9. Applications will also be considered from members completing a probationary scheme with their employer.

“Taking part in the mentoring scheme has really helped to boost my confidence with the CII exams. It has helped me to stay motivated, increased my knowledge of the different pathways available, and meet others in the industry who are trying to balance work and studying. The advice I've obtained from this has been invaluable.”

Lucie Dean Dip CII  
Product Recall – Senior Account Handler  
Howden Specialty

# Information for Buddy Mentors

## Role of the Buddy Mentor

We are looking to recruit 12 volunteers to be Buddy Mentors for our 2023 intake.

### Buddy Mentors will:

- have qualified at Advanced Diploma level (ACII or APFS) in 2016 or later;
- be happy to commit to three years as a Buddy Mentor;
- have sufficient time to follow up attendance and motivation of Mentees. It is envisaged Buddy Mentors will have four Mentees within a team of eight alongside another Buddy Mentor;
- have a working knowledge of CII's RevisionMate and willingness to undergo basic familiarisation with the new learning and assessment programmes; and
- where possible attend all the events listed on page 6.

## Personal qualities required of a Buddy Mentor

### We are looking for volunteers with:

- a positive outlook;
- an interest in leadership;
- an open mind; and
- the ability to work and communicate with people at all ages and stages of their career.

While the onus is on the Mentee to forge and to drive the relationship, Buddy Mentors are expected to be proactive if the need arises and to share the responsibility for motivating Mentees, encouraging their regular engagement and attendance at events.

“I have thoroughly enjoyed being an IIL Buddy Mentor, and have found it very rewarding. The mentees are enthusiastic, bright and keen to learn. We have monthly meetings and celebrate everyone's successes in their exams and coursework. I would recommend being a mentor to anyone who has recently obtained their ACII qualification.”

Leanna Mailer ACII, Senior Technical Adjuster,  
Aspen Insurance UK Ltd

## Why volunteer?

Perhaps you have reached a stage of your career when you would like to put something back into your professional community. Volunteering as a Buddy Mentor is a real, practical way of doing so.

You can also state your mentoring experience on your professional CV.

## The fine print

This is a qualification mentoring scheme, not a career mentoring scheme. Being a Buddy Mentor isn't an opportunity to recruit new staff – the poaching of mentees from their current employer is unacceptable.

## How to apply

Please complete the application form on page 8 and email it together with your CV to [gemma.warren@cii.co.uk](mailto:gemma.warren@cii.co.uk)














## Next steps

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“The sharing of knowledge, especially around how to approach certain revision topics or answer exam case studies, is something that cannot be learned purely out of a textbook. That is where the practical and collaborative support system provided through the IIL programme can add real value. The pooling of expertise from people in differing career stages allows everyone to benefit in some way from the group. As a Mentor, I find it immensely rewarding to be part of someone's career journey.”

Sandra Corkhill APFS, Chartered & Certified Financial Planner, MSCI, MA,  
Fairstone Financial Management Ltd

# Qualification Mentoring Scheme Programme 2022-23

Date	Time	Title	Who should attend?	Objectives	Speakers
31 Oct 2022	13:30-14:30	Introducing the Qualification Mentoring Scheme	Potential Buddy Mentors, Mentees and their employers	<p>What to expect from the scheme</p> <p>First-hand experience from current participants</p> <p>To reserve your place, please book online at <a href="http://iilondon.co.uk">iilondon.co.uk</a> before Friday 28 October 2022.</p>	<p>Chair, Qualification Mentoring Committee</p> <p>You will also hear from a Committee Member, Buddy Mentor and Mentee.</p>
13 Feb 2023	13:00-14:00	Buddy Mentor Best Practice		<ul style="list-style-type: none"> <li>Welcome</li> <li>Panel introductions</li> <li>Guidance and advice for new intake</li> </ul>	Buddy Mentors
20 Feb 2023	15:00-17:00	Qualification Mentoring Scheme 2023 launch event	  	<ul style="list-style-type: none"> <li>Welcome and introduction</li> <li>How to get the most out of the mentoring scheme</li> <li>Role of a Buddy Mentor</li> <li>Role of a Mentee</li> </ul>	<p>Chair, Qualification Mentoring Committee</p> <p>Samantha Ridgewell ACII, Managing Director, Empower Development and Emma Ackers Cert CII, Learning Specialist, Empower Development</p>
Spring 2023		Pathways to qualification and CII study tools	 	<ul style="list-style-type: none"> <li>Overview of qualification levels and points required</li> <li>CII study tools and exam technique</li> </ul>	<p>General Insurance: Linda Prewett FCII, Trainer, Linda Prewett Ltd</p> <p>Financial Planning: Mick Whatley DipPFS, Corporate Development Manager, Chartered Insurance Institute</p>
Spring 2023		Examination, mixed assessment and coursework assignment techniques for general insurance students and a separate event for financial planners	 	<ul style="list-style-type: none"> <li>Using published CII guidance and resources</li> <li>How to deconstruct the question</li> <li>Build a coherent assignment</li> <li>The importance of understanding the CII marking matrix</li> <li>Using your company contacts for source information</li> </ul>	Alison Cooper FCII, Dip PFS, Director, ACT One Training Services Ltd (Chartered Insurance Practitioner)
Spring 2023		Accelerated learning techniques	 	<ul style="list-style-type: none"> <li>Memory principles</li> <li>Techniques: <ul style="list-style-type: none"> <li>Number lists</li> <li>Room system</li> <li>Journey system</li> <li>Mind maps</li> </ul> </li> <li>Application to study</li> </ul>	Rob Murray ACII, Partner, Head of Actuarial, BDO LLP
Summer 2023		Summer networking event	  	<ul style="list-style-type: none"> <li>Networking</li> <li>Opportunity to build relationships and congratulate other scheme participants</li> <li>Meet committee members</li> </ul>	

# Qualification Mentoring Scheme Application Form – Mentee

- Complete the application form and email to [gemma.warren@cii.co.uk](mailto:gemma.warren@cii.co.uk)
- Applications will be accepted from 31 October 2022 to 23 January 2023

Mr/Mrs/Miss/ Ms/Mx/Other	Surname/ Family name			Forename/ Given name(s)				
Date of birth	Male	Female	Prefer not to say	Are you contractually obliged to qualify in less than 3 years?	Yes	No		
Do you hold any CII qualifications?	Yes	No	If 'Yes' what CII qualification do you currently hold					
CII/PFS PIN (if known)	Area of business:			Broking	Claims	Underwriting	Management	Financial Planning
Speciality	<i>(e.g. Aviation, Financial Planning, Property, Reinsurance)</i>							
Employer's name								
Job title								
Work address								
Postcode	Country							
Home address								
Postcode	Country							
Email	Tel			Mobile				
<b>Address to be used for correspondence</b>	Home	Work	LinkedIn profile URL					

## Qualification mentee declaration

I declare that all information provided by me on this form is true and correct.  
 If selected, I will contribute to the IIL Qualification Mentoring Scheme to the best of my ability and agree to fully comply with the Mentoring Terms and Conditions set out in this brochure (see page 9).  
 I will keep in regular contact with my mentors and will inform the IIL in case of any issues.

Signature

Date

# Qualification Mentoring Scheme Application Form – Mentor

- Complete the application form and email to [gemma.warren@cii.co.uk](mailto:gemma.warren@cii.co.uk)
- Applications will be accepted from 31 October 2022 to 23 January 2023

Mr/Mrs/Miss/ Ms/Mx/Other	Surname/ Family name		Forename/ Given name(s)				
Date of birth	Male	Female	Prefer not to say	When, since 2016, did you complete the CII Advanced Diploma in Insurance/Financial Planning?			
CII/PFS PIN (if known)	Area of business:		Broking	Claims	Underwriting	Management	Financial Planning
Speciality	<i>(e.g. Aviation, Financial Planning, Property, Reinsurance)</i>						
Employer's name							
Job title							
Work address							
Postcode	Country						
Home address							
Postcode	Country						
Email	Tel		Mobile				
<b>Address to be used for correspondence</b>	Home	Work	LinkedIn profile URL				

## Qualification mentor declaration

I declare that all information provided by me on this form is true and correct.  
 If selected, I will contribute to the IIL Qualification Mentoring Scheme to the best of my ability and agree to fully comply with the Mentoring Terms and Conditions set out in this brochure (see page 9).  
 I will keep in regular contact with my mentees and will inform the IIL in case of any issues.

Signature

Date



# Mentoring Terms and Conditions

The Insurance Institute of London (IIL) is committed to providing a mentoring environment where all Buddy Mentors and Qualification Scheme Mentees are treated with dignity and respect. By participating in this mentoring scheme, you agree to abide by these terms and conditions.

Buddy Mentors are volunteers who have skills and experience and have given up their time to assist Mentees in completing the Advanced Diploma.

By joining, Mentees are agreeing to:

- Maintain a CII/PFS membership and membership of the Insurance Institute of London (or be willing to transfer your membership from another local institute) throughout the scheme.
- Have an active LinkedIn account.
- Share your email address with IIL staff, Buddy Mentors, Advocate Mentors and other Mentees in the scheme to send you details of mentoring and CPD events and to exchange opinions and information about the qualification mentoring scheme. This data is not to be used for procuring employment or business.
- Allow IIL staff to share your progress with your employer and Qualification Mentoring Committee members.
- Attend three mandatory events in the first year.
- Complete feedback forms and surveys from time to time to help fine-tune this scheme.

Mentors and Mentees agree:

- To be subject to and comply with the CII's Code of Ethics found at: [cii.co.uk/code](http://cii.co.uk/code)

## 1. Liability

- 1.1 The IIL does not provide mentoring services but has established a mentoring scheme that will enable Buddy Mentors and Qualification Scheme Mentees to meet. Mentees acknowledge that any services provided by a Buddy Mentor during the mentoring scheme are provided free of charge and in good faith.

- 1.2 The IIL takes reasonable steps to ensure the quality and accuracy of the information provided to the parties during the qualification mentoring scheme but neither the IIL, nor its employees, contractors or associated parties, will be responsible for the suitability of the introductions or the framework nor of the completeness or accuracy of any information, howsoever provided, or the success or otherwise of any qualification mentoring relationship. Except in respect of death or personal injury caused by the IIL's negligence, the IIL shall not be liable to any Party by reason of any representation (unless fraudulent) for any indirect, special or consequential loss or any other loss however caused under the qualification mentoring scheme.

## 2. Confidentiality

- 2.1 Certain information may pass between Buddy Mentors and Qualification Scheme Mentees that could be confidential. Buddy Mentors and Mentees agree to keep in strict confidence all and any information of a confidential nature which is obtained about any other party or their work during the mentoring scheme. If you are unsure whether the information you have been provided with is confidential, please confirm the position by asking the person that gave the information to you.

## 3. Data Protection

- 3.1 In the event information passing between Buddy Mentors and Qualification Scheme Mentees contains personal data, you are required to comply with the relevant Data Protection laws. You must ensure that appropriate measures are taken against unlawful or unauthorised processing of personal data, and against the accidental loss of, or damage to, personal data.
- 3.2 Maintaining data security means guaranteeing the confidentiality, integrity and availability of personal data. You must not disclose personal data to anyone without the other party's consent.
- 3.3 You agree that your personal data can be used in compliance with our Data Protection and Privacy statement, as amended from time to time, found at [iilondon.co.uk/commons/15788/3648](http://iilondon.co.uk/commons/15788/3648)

## 4. Consequences

- 4.1 You are responsible for complying with these Mentoring Terms and Conditions and you will be personally responsible for any breach of it. It is likely that any breach will result in your expulsion from the mentoring scheme and could lead to disciplinary action by the Chartered Insurance Institute. Please therefore act in a professional and courteous manner.
- 4.2 If you have any query about the content of this policy, please speak to a member of IIL staff.