



CISI Chartered Wealth Manager Qualification

Revision Programmes for Summer 2021 Exams (June/July 2021)

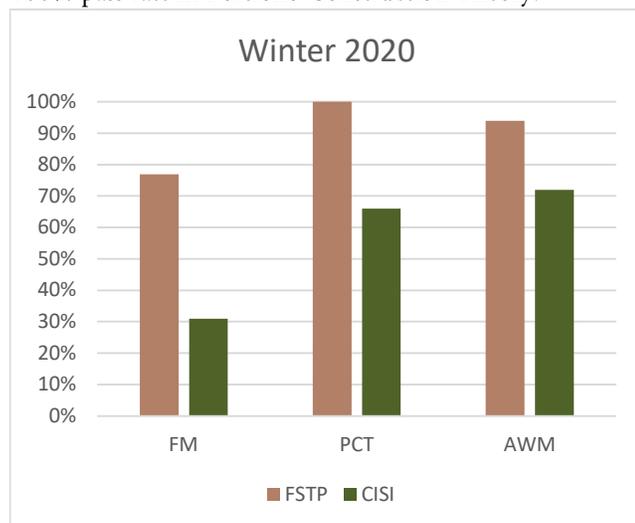
The Chartered Wealth Manager qualification is recognised as the gold star qualification for private client wealth managers in the industry today. As a specialist postgraduate level 7 qualification, exam support is critical for students to comprehend the breadth of content and ensure timely completion. We have developed a programme which is worthy of consideration by any individual or firm.

Get results

For firms who fund studies it's imperative that trainees complete their qualifications and move into supervised roles, starting to show a return on investment, we know how important it is for students to pass exams.

We believe that our courses have a methodology of approach which creates a learning environment more conducive to students passing first time.

Over the last 7 years, FSTP students have consistently produced above average results. Winter 2020 students achieved 8 Merits and 3 Distinctions, with an exceptional 100% pass rate in Portfolio Construction Theory.



Pass Rates FSTP vs. CISI National Average
(based on all students)

What our students say

Don't just take our word for it. Students have given their reasons why they choose FSTP courses:

'I came to FSTP having struggled to complete my Level 7 exams whilst training with other providers. Put simply, I could not recommend them more. The tutor, Ian Richardson, guides you in such a way that you are genuinely confident of being successful on exam day. Through a unique combination of both good humour and an unrivalled knowledge of the syllabus, he breaks down previously complex ideas and provides you with the necessary tools to achieve your goals, and within a small class you benefit from what is more of a seminar type environment than lecture. I (along with many other students) will forever be grateful to FSTP and Ian'. Dec 2019

"I'd like to take the opportunity to thank you for how brilliant you were throughout the course days! I, and the rest of my group, felt confident and prepared going into the exam, and that's very much due to the time and care you put into your teaching. I'm very grateful" Dec 2019

"Thanks so much for everything, Jo! I'm sure you already know, but it was passes across the board for my year at my firm, due in no small part to your brilliant teaching – FSTP are very lucky to have you!" Aug 2018

Previous students are CISI award winners, including achieving the highest overall mark for the CMW qualification and individual highest marks in a paper.

Why choose us?

With a limited number of training providers offering study support for the CWM papers, why choose us?

As a CISI Premier Accredited Training Partner, we believe the benefits to firms and students are:



- Direct access to tutors and an FSTP Client Services Manager
- An opportunity to take a free 2 day revision session (dependant on availability) should an individual be unsuccessful after completing the full study programme (1st attempt only), proving that we are confident that ours is a first class programme
- Online student area offering podcasts, end of chapter questions, live course recordings and other supporting documents to maximise learning

To maintain the integrity of our offering we have limited availability and will allocate on a first come, first served basis, so booking early is recommended.

What makes the programme different?

- Limiting class numbers to a maximum of 12 students for study courses
- Study progress 'calculator' to make sure goals are being met
- Tutors provide 1:1 time, help and support through the course duration, tasks are set for completion to ensure self-study
- Short videos concentrating on areas of specific difficulty which can be viewed at anytime and recordings of the live courses.
- Access to Advice Matters – a monthly structured CPD publication with topical and practitioner-led articles to support wider learning
- Case studies and examples based on private clients and high net worth investment knowledge
- Careful review of past papers helps us anticipate likely future questions for mock exam (these are updated to reflect any changes to syllabus/regulation)
- We provide our honest opinion on the progress of the firm's candidates to internal stakeholders

Study Options

Not all students want a classroom based course (remote or not), and not all firms offer financial support, so a choice of options is key to an individual's success.

For those who wish to take advantage of face-to-face programmes, these are offered as 8 day study courses covering the syllabus content or 2 day revision sessions focussing on areas where the tutors know students often struggle, often using the marked mock exams outcomes to develop this. Due to current restrictions we are delivering live courses via Zoom Meetings.

Students can also request 1:1 revision to concentrate on their individual needs and problem areas. Early booking is recommended as tutor availability for 2 hour slots is very limited.

The winter exams will be held in February 2021 so the revision courses will be held in January to ensure sufficient study time.

Full study package

8 day study course – 6 days covering the syllabus plus 2 days revision and a marked mock exam with individual feedback, plus access to Advice Matters.

Standalone options - priced so students can invest in their own learning....

Revision only

2 day classroom based revision only

1:1 twilight revision

2 hours with a tutor to focus on specific development needs

Marked mock exam only

A practice exam taken in 3 hours, which is marked and individual feedback given.

Tutors and course dates

Lead Tutor - Ian Richardson M.C.S.I has become a leading figure in the provision of tuition and one-to-one coaching for the higher level RDR qualifications and we frequently receive messages of personal thanks from his candidates. Since 2002 he has been engaged in a mix of compliance and training assignments for major clients of FSTP.



He is particularly skilled at analysing complex information and drawing upon his experience and knowledge of the industry to arrive at practical solutions. He also communicates information clearly and ensures that key messages are communicated at the right level to the right audiences.

Through his work, Ian is very familiar with the FCA's requirements for firms and for senior management and outside of his qualification teaching, Ian delivers courses on Market Abuse, Offshore Bonds, Taxation and SM&CR.

He is an Associate of the Chartered Institute of Bankers, holds the Financial Planning Certificate and Chartered Investments and Securities Institute Level 6 PCIAM and Level 7 Chartered Wealth Manager qualifications.

Ian has a very interactive delivery style, bringing weighty subjects to life by drawing on over 30 years' of practical experience.

Johanna Kirby has over 20 years' experience in the industry, and is a fixed income and derivatives specialist.



Her initial career with JP Morgan saw her quickly rise to Director of Fixed Income based in South Africa at Barclays.

For the last 9 years' Jo has been working as a consultant to provide technical training for financial institutions on topics such as derivatives in fund management, exchange traded derivatives, over the counter derivatives, swaps, fixed income and liability driven investments.

Jo supported many firms through the RDR transition; writing and delivering CISI accredited gap-fill courses to many who complete specialist regulated activities. She also delivers CISI courses to college students to develop their knowledge of the financial services industry and is the Principal Moderator for the CISI schools qualification.

Jo is a very thorough and conscientious tutor whose background means she can adapt sessions to ensure students get the knowledge of how to apply the syllabus alongside the theory. Most recently Jo has been supporting firms with preparations for SM&CR, especially the Conduct Rules.

| Unit 1 – Financial Markets (FM) | | | | | |
|---------------------------------|---|---|---|---------------------------|---|
| | Session 1 | Session 2 | Session 3 | Mock Exam | Session 4 (Revision) |
| Group 1 | 3 rd & 4 th March | 24 th & 25 th March | 12 th & 13 th April | 27 th May 2021 | 7 th & 8 th June 2021 |
| Group 2 | FULL | FULL | FULL | | FULL |

| Unit 2 – Portfolio Construction Theory (PCT) | | | | | |
|--|---|---|---------------------------------------|---------------------------|---|
| | Session 1 | Session 2 | Session 3 | Mock Exam | Session 4 (Revision) |
| Group 1 | 1 st & 2 nd March | 22 nd & 23 rd March | 4 th & 5 th May | 24 th May 2021 | 7 th & 8 th June 2021 |
| Group 2 | FULL | FULL | FULL | | FULL |

| Unit 3 – Applied Wealth Management (AWM) | | | | | |
|--|---|--|---|---------------------------|---|
| | Session 1 | Session 2 | Session 3 | Mock Exam | Session 4 (Revision) |
| Group 1 | 3 rd & 4 th March | 24 th & 25 th March | 12 th & 13 th April | 24 th May 2021 | 9 th & 10 th June 2021 |
| Group 2 | 10 th & 11 th March | 31 st March & 1 st April | 21 st & 22 nd April | | 16 th & 17 th June 2021 |

Prices

| | | |
|---------------------------------------|--|--|
| Revision Only | 2 days revision only classroom course | £440 |
| 1:1 Twilight Revision Sessions | 2 hours focused on individual needs (face to face or Skype) | £350 |
| Full Mock Exam | Marked and returned as an additional practice paper | FSTP students - £175 Non-FSTP students - £200 |

Excludes VAT. CISI workbook and all related exam fees, these must be purchased directly from the CISI

all courses are subject to change or cancellation at any time, based on minimum student numbers

Other qualification support

FSTP tutors teach many other qualification papers as part of the CISI pathways including:

- Level 2 – Fundamentals of Financial Services
- Level 3 – Introduction to Securities and Investments
- Level 3 – Investment Operations Certificate
- Level 4 – Investment Advice Diploma (including Financial Planning & Advice)
- Level 6 – Certificate in Private Client Investment Advice & Management (PCIAM)

Other awarding bodies' qualifications are also supported from the **CII, CFA, CIOBS and LIBF**. Please contact us for more details on any needs you or your firm may have.



Apprenticeships

We are delighted and proud to have been recognised as an Apprenticeship Main Provider, enabling us to work with and support our clients at all stages of their apprenticeship journey.

Age and level of professional experience are no barriers. A professional qualification awaits those who complete their apprenticeship and depending on the pathway selected, this will be equivalent to GCSE all the way through to Bachelor's and Masters Degree level.

Contact us to discuss your next steps.

Contact Us

To discuss your needs and how we can support you or your firm please contact us:

0203 178 4230

info@fstp.co.uk

www.fstp.co.uk

We are able to take provisional bookings for students awaiting their exam results, so contact us for availability.