

CISI Chartered Wealth Manager Qualification

fstp
financial
services
training
partners

Study Programmes for June 2019 exam

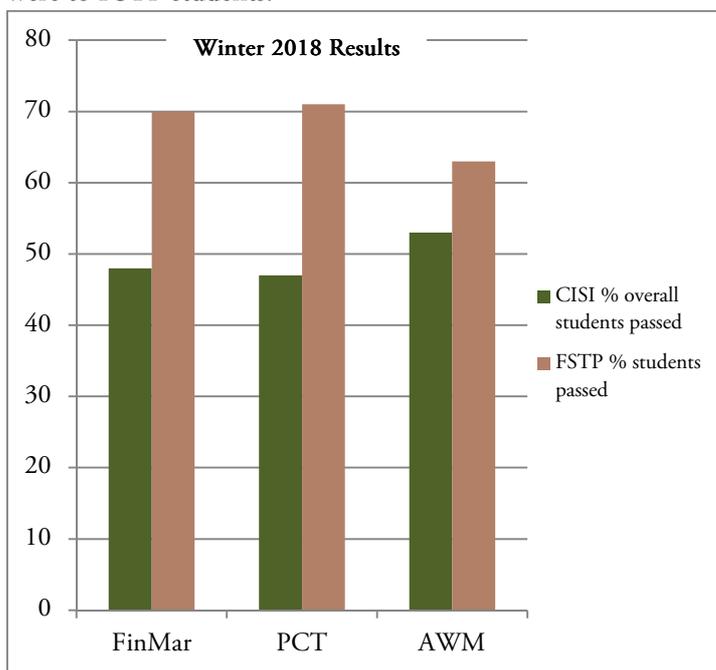
The Chartered Wealth Manager qualification is recognised as the gold star qualification for private client wealth managers in the industry today. As a specialist postgraduate level 7 qualification, exam support is critical for students to comprehend the breadth of content and ensure timely completion.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

Get results

We know how important it is to students to pass exams first time. 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 believe that our courses have a methodology of approach which creates a learning environment more conducive to candidates passing first time.

Over the last 6 years, FSTP students have consistently produced exceptional results with merits and distinctions. In the winter 2018 PCT exam, the only **2 distinctions** awarded were to FSTP students.



National Pass Rates CISI vs. FSTP
(based on full course, revision &
1:1 attendance)

What our students say

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

"Thanks very much for your help Ian (both with this exam AND previous ones). I have no doubt your assistance made a huge difference - not just in teaching me the bits I didn't know, but generally making me feel more comfortable with how to approach the various question types (the latter being something I don't feel you get in a larger class environment)" Dec 2019

"FSTP provided friendly and responsive support during my studies. The tutor, Ian Richardson, brought a wealth of real life experience to the course material which proved invaluable in achieving practical learning objectives of the Applied Wealth Management unit" Dec 2017

"My advice would be to choose a training provider that works best for you. Ian Richardson at FSTP was outstanding in providing the teaching and support that was required to achieve the CWM Qualification. As a proactive learner the small groups and the interactive nature of Ian's FSTP courses were a huge benefit to me" CISI CWM Overall Award Winner 2016

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.

Why choose us?

There is a smaller number of training providers offering study support for the CWM papers, so 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 Relationship 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 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.

Study Options

Not all students want a classroom based course, 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.

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 June exams will be held in early June 2019 so the classroom courses will begin in early March to ensure sufficient study time for all students.

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 subscription to Advice Matters

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

Revision only

2 day classroom based revision only, plus an additional 1 day session due to the exam date extension

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.

What makes the programme different?

- Limiting class numbers to a maximum of 10 candidates for study courses and 12 for revision sessions
- Study progress 'calculator' to make sure goals are being met
- Tutors provide 1:1 time, help and support through the course duration, tasks and "homework" are set for completion to ensure self-study
- Short videos concentrating on areas of specific difficulty which can be viewed at anytime
- Subscription 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

Our tutors

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 leads our open courses on such topics as the Foundation in Regulation, Foundation in COBS and Financial Promotions. 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 8 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.

Prices

Full Study Course	8 days 6 fully tutored study days, 2 revision days, marked mock exam, monthly Advice Matters subscription and online student area access	£1,955
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)	£250
Full Mock Exam	Marked and returned as an additional practice paper	FSTP students - £150 Non-FSTP students - £175

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

Study support programme

March – May 2019 – London

Unit 1 – Financial Markets (FM)

	Study Course				Revision
	Session 1	Session 2	Session 3	Mock Exam	Session 4
Group 1 (FULL)	13 th & 14 th March	27 th & 28 th March	10 th & 11 th April	1 st May	15 th & 16 th May
Group 2 (FULL)	18 th & 19 th March	1 st & 2 nd April	15 th & 16 th April		20 th & 21 st May
Group 3	25 th & 26 th March	8 th & 9 th April	24 th & 25 th April		13 & 14 th May

Unit 2 – Portfolio Construction Theory (PCT)

	Study Course				Revision
	Session 1	Session 2	Session 3	Mock Exam	Session 4
Group 1	4 th & 5 th March	27 th & 28 th March	15 th & 16 th April	2 nd May	13 th & 14 th May
Group 2	18 th & 19 th March	3 rd & 4 th April	23 rd & 24 th April		20 th & 21 st May

Unit 3 – Applied Wealth Management (AWM)

	Study Course				Revision
	Session 1	Session 2	Session 3	Mock Exam	Session 4
Group 1 (FULL)	6 th & 7 th March	1 st & 2 nd April	17 th & 18 th April	3 rd May	15 th & 16 th May
Group 2	20 th & 21 st March	8 th & 9 th April	25 th & 26 th April		22 nd & 23 rd May

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

Other qualification support

FSTP tutors teach many other CISI qualification papers including those for the Certificate in Paraplanning and Certificate in Corporate Finance, Investment Advice Diploma (IAD), Certificates and Diplomas (including PCIAM with gap-fill which can be used as an exemption to the Financial Markets CWM paper).

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.