

CISI Financial Planning Qualifications



Since the merger with the IFP, the CISI have worked hard to develop their qualification pathways for Financial Planners. There are now two routes to achieve the level 4 benchmark and a diploma leading to Certified Financial Planner status.

Certificate in Paraplanning – Level 4

Aimed at those who are already working as a Paraplanner, but who wish to develop their skills in preparation for a move to a Financial Planner role. This qualification ensures you have the right balance of technical knowledge and skills to perform your role.

There are two exam papers:

- Financial Planning and Advice
- Taxation in the UK for Individuals and Trusts*

*(The Investment, Risk and Taxation unit of the level 4 Diploma in Investment Advice can be taken by candidates who may require an RDR-compliant qualification)

All are examined by computer based testing, with a total estimate of 263 hours recommended study.

Investment Advice Diploma (IAD) - Level 4 and RDR compliant

As part of the IAD qualification, the Financial Planning and Advice paper has been designed to be RDR compliant and meet the requirements for those advising on retail investment products and friendly society tax-exempt policies (FCA activities 4 and 6). For those wishing to pursue a career in financial planning, or wealth managers wanting to broaden their knowledge, this route provides solid coverage of key principles and technical knowledge.

There are three exam papers:

- UK Regulation and Professional Integrity
- Investment, Risk and Taxation
- Financial Planning and Advice OR
- Retail Advice & Planning

Diploma in Financial Planning

Leading to Certified Financial Planner™ certification, this specialist qualification will test your application of the knowledge and skills you already hold to produce a financial plan.

You will be issued with a case study and given 12 weeks to submit your plan. Assessment takes 8 weeks; with feedback given on the plan should you not meet the criteria within the marking standards. You can re-submit your plan within a new 12 week period once you have addressed the development areas.

With an estimated 400-700 hours of recommended study time this route is for those with a strong background in financial planning who want to challenge themselves and stand out from the crowd.

Full details of the syllabus content, eligibility criteria and factsheets for each qualification can be found on the CISI website – www.cisi.org

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

Why choose us?

As a CISI Premier Accredited Training Partner, we believe the benefits to those who choose to study with us are:



- Direct access to tutors and an FSTP Client Relationship Manager
- Experienced tutors with a financial services background. (Our lead tutor has already taken and passed the Financial Planning & Advice paper so has a deep understanding of the syllabus and exam expectations)
- Access to a variety of study options
- Advice Matters – monthly structured CPD with topical articles to broaden your knowledge – small additional fee applies

Study Options

IAD - Financial Planning and Advice

Classroom based revision

2 day classroom based intensive revision tuition - ideal for those who have already prepared using the CISI workbooks and are looking to embed their knowledge. Small group sizes of up to 12 people.

Firm specific in-house options

Classroom revision - As per the classroom based revision above but delivered at your offices. This option is perfect for those not wanting to travel and wishing to revise in the comfort of their own office or those who have already prepared using the CISI workbooks and wish to study in small group sizes of up to 12 people.

Classroom based study programme – An intensive 3 day course. The programme includes homework and evening activity to maximise the students' learning and increase their chances of passing.

Individual coaching - via telephone call or Skype, allowing students to discuss any concerns directly with a tutor.

Prices

Financial Planning and Advice

2 day revision course	9 th & 10 th January 2019	£495 per person
In-house 2 day revision	As agreed - maximum of 12 students	£4250
In-house 3 day study course	As agreed – maximum of 12 students	£6375
1:1 coaching – 1 hour session	Via telephone or Skype	£175
Advice Matters Subscription (CPD accredited)	12 editions	£35 per year

Prices exclude VAT and all related CISI exam fees, workbooks and e-learning which must be purchased directly from the CISI