CISI Private Client Investment Advice and Management (PCIAM)

The level 6 PCIAM qualification is an FCA recognised paper which is aimed at existing advisers to increase their knowledge and technical expertise. With over 200 recommended study hours and a written narrative examination, tutor support can make a real difference to your understanding and interpretation of the broad syllabus. FSTP have developed a classroom study programme which supports individual learning with exceptional tutors.

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. For individuals it's a deepening of understanding and the ability to provide a better service to future clients.

For many this will be the first narrative response paper taken, and the approach is very different to level 4 questioning.

With small study groups and experienced tutors (who have passed and teach the higher Level 7 CWM exams), students receive the technical knowledge and exam practice needed to be confident in the exam room.

What our qualification students say

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

"Ian Richardson first helped me when I was working towards the PCIAM 'Private Client Investment Advice and Management' exam and then subsequently the 'CWM' papers. During this rather stressful period Ian has always made time for me and somehow managed to explain things in a way I could always comprehend. He is incredibly approachable and is a huge credit to FSTP and of course himself as to the way in which he conducts himself and teaches his pupils. His record of course speaks for itself!"

"These qualifications are time consuming but it is worth it. 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. As a proactive learner the small groups and the interactive nature of Ian's FSTP courses were a huge benefit to me."

Contact us

To discuss your needs and how we can support you or your firm please contact us. In-house courses can also be arranged for graduate schemes or firm development programmes.

0203 178 4230

info@fstp.co.uk

www.fstp.co.uk

Why choose us?

There are fewer training providers offering study support for the CISI PCIAM paper, so why choose us?
As a CISI Premier Training Partner, we believe the benefits to firms and students are:

- Direct access to tutors and an FSTP Client Services Manager
- Online student area offering podcasts, end of chapter questions and other supporting documents to maximise learning
- Small study groups to encourage interaction and ensure time is given to exam technique and technical knowledge practice

Study packages

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

For those who wish to take advantage of a face to face programme, this is offered as an 8 day study course, covering the syllabus content.

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.

A marked mock exam allows students to complete a 3 hour question paper and return the responses to a tutor for marking. Individual feedback will then be given with recommendations on areas for attention, to focus revision studies.

Full study package- RDR compliant
8 day study course – covering the syllabus with exam practice, marked mock exam, online student area and subscription to Advice Matters publication

<u>Standalone options</u> - **priced so students can invest in their own learning….**

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.

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.

Course Dates

With examinations taken in June and December we would recommend that study courses follow self study to ensure maximum learning benefits. Starting study support in early March and September will allow sufficient time to complete a course, which is usually divided in three 3 sessions.

Pricing

In-house Full Study Course	**8 days** Fully tutored study days, marked mock exam, 12 months Advice Matters subscription and online student area access	On request
1:1 Twilight Revision Sessions	**2 hours** focused on individual needs	£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

Other qualification support

FSTP tutors teach many other **CISI, CII, CIOBS, CFA and LIBF** qualifications which can be delivered as in-house events e.g. as part of a graduate/apprenticeship programmes or others as open courses, please contact us for more details.

CISI specific qualifications

- Introduction to Securities & Investment
- Investment Advice Diploma (including Financial Planning & Advice)
- Certificate in Investment Management
- Certificate in Paraplanning
- Investment Operations Certificate (IOC)
- Chartered Wealth Manager
- Capital Markets Programme
- Regulation & Compliance
- Corporate Finance (CFq)

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 apprenticeships 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.