



As specialists in CISI qualifications, we offer our clients and delegates the best opportunities for examination success.

Our record of significantly higher than average success rates and dedicated, expert tutors committed to providing first class support make our programmes excellent value.

What is the Chartered Wealth Manager Qualification?

It is the CISI's top investment management award and is a postgraduate level 7 qualification. It is very well regarded and demonstrates the highest level of competence in developing investment portfolios for clients.

It is comprised of three units:

- Financial Markets
- Portfolio Construction Theory
- Applied Wealth Management

You must meet the CISI entry requirements to achieve the award. Exemptions are offered for Financial Markets only. Details on the CISI website.

Why choose to study with us

- We have an excellent success rate
- We are results driven and provide unrivalled support to our clients
- We limit our class sizes to a maximum of 12 delegates
- Our materials are interactive, creative and focussed closely on examination success
- We provide 24/7 direct tutor access throughout the course and right up to exam day
- When delegates are sponsored by their company, we keep L&D managers continually updated with progress
- We pride ourselves on being the most flexible provider, offering a range of quality study options
- If you study for an exam with us, you'll feel as though we're taking the exam with you!

'I was lucky enough to have Cris Glasgow as a tutor for all three of the Chartered Wealth Manager exams. He was very helpful throughout, responding quickly to queries and giving invaluable advice about exam day. I would definitely recommend him to anyone taking the qualification.'

Robin Ellis, Chartered Wealth Manager Overall Winner CISI Awards Ceremony 2015, Smith & Williamson

Choose how you wish to study

Study options apply to each unit

| Support option | What is included? | Locations | Price |
|----------------------|--|---------------------|------------------------|
| Comprehensive course | 4 x 2 day tutor led workshops 24/7 access to tutor support and further online activities Full mock exam, marked with detailed feedback | Liverpool London | £1700 plus VAT |
| Revision course | 1 x 2 day tutor led workshop 24/7 access to tutor support from the course up to the exam | Liverpool London | £450 plus VAT |
| Mock exam only | Exam is emailed to you and marked with detailed feedback | N/A | £125 plus VAT |
| Email support only | 24/7 email access to a tutor | N/A | £50 per month plus VAT |
| One-to-one support | Support from a tutor as agreed to meet individual needs | By arrangement | £90 per hour plus VAT |

CISI fees, exam entrance and course book are not included. Courses are subject to minimum numbers. Other locations can be arranged, subject to sufficient demand.

What do people say about us?

‘I had the pleasure of being taught by Cris for my Chartered Wealth Manager qualification. Cris is enthusiastic, incredibly knowledgeable on his subject matters and teaches in a way that is easily understood. He is incredibly supportive, not only whilst in the training session but also by responding to questions on the material in personal study time. I felt well prepared for each of the exams I sat having been taught by Cris. Cris’ achievement record speaks for itself and I would be happy to recommend him to anyone who is looking for an excellent trainer for financial services exams.’

Katherine Tasker, Investment Manager, Charles Stanley & Co. Ltd.

‘Cris stands out as someone that genuinely understands both the content of his training material and the individual needs of those taking the course. His training sessions are well paced and flow naturally between topics, with sufficient time reserved for open conversations and individual questions. Cris succeeds in creating an engaging learning environment which is supported by an impressive pass rate. I would happily recommend him to anyone and will certainly be working with him again.’

Matt Dickinson, Investment Manager, Walker Crips Stockbrokers Ltd.

To book a place on a course or to discuss your requirements

www.glasgow.co.uk/courses info@glasgow.co.uk or call us on 0203 292 9229