



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

Following our success with the Chartered Wealth Manager qualification and our experience in supporting clients to pass the IAD units on a one-to-one basis, we are pleased to offer our new courses for the IAD qualification. We can effectively prepare delegates for these exams and give them the necessary skills to progress to the Chartered Wealth Manager qualification if they wish.

What is the Investment Advice Diploma Qualification?

It is a CISI level 4 qualification and is the minimum required standard to give regulated investment advice.

It comprises of two compulsory units:

- UK Regulation & Professional Integrity
- Investment, Risk & Taxation
- One additional unit must be taken from the following:
 - Derivatives
 - Securities
 - Private Client Advice

Each unit is assessed by an 80 question multiple choice paper apart from Private Client Advice that is assessed by a three hour narrative exam.

The CISI website gives details of exemptions.

Why choose to study with us

- We are highly 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 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
Revision course for multiple choice exams	1 x 2 day tutor led workshop 24/7 access to tutor support from the course up to the exam	Liverpool London	£400 plus VAT
Revision course for Private Client Advice	1 x 3 day tutor led workshop 24/7 access to tutor support up to the exam	Liverpool London	£600 plus VAT
Mock exam only (PCA exam)	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