



As a CISI Premier Training Partner and qualifications specialist, we offer our delegates the best opportunities for first time success.

We consistently achieve higher than national average success rates with expert, dedicated tutors committed to providing first class support.

We specialise in training advanced level qualifications. Our CISI Premier Training Partner status is mainly due to training the Chartered Wealth Manager qualification. Uniquely, we are committed to providing training both in London and other regions of the UK in order to maximise your convenience and minimise your disruption.

### 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.

PCIAM offers an exemption from Financial Markets with CPD gap fill.

### Why choose to study with us

- We are a CISI Premier Training Partner demonstrating we meet the highest quality standards set by the CISI.
- We are qualification specialists and have been supporting people to achieve examination success for the last 18 years.

- We limit our class sizes to a maximum of 10 delegates for comprehensive courses and 12 delegates for revision courses.
- We provide expert tuition focused on exam preparation from day one.
- On-line materials provide course slides, notes, practice exam questions, past exam papers, additional exercises, videos covering the more complex areas and podcasts.
- Our comprehensive course delegates benefit from two mock exams to prepare them for exam day.
- We carefully review all past exams and syllabus reviews to ensure our course materials and mock exams prepare you for exam success.
- We achieve pass rates higher than national averages in each exam sitting.
- We provide ongoing feedback to L&D managers and work with them to provide the best support for each individual. Our flexible approach to individual support when needed is appreciated by our clients.
- Our comprehensive course delegates have 24/7 email tutor access.
- We offer a free revision course for anyone who is unsuccessful in the exam, subject to terms and conditions.

## Highlights of results from 2017

Above average pass rates for Financial Markets in both sittings. We achieved the only merits nationally for Financial Markets in December 2017.

First time passes for 14 of our 15 Portfolio Construction Theory June 2017 comprehensive course delegates.

First time passes for 14 of our 16 Applied Wealth Management December 2017 comprehensive and revision course delegates – 30% higher than the national pass rate.

## COMPREHENSIVE COURSES

Course	Course Dates	What is included	Price	CISI exam date
Financial Markets London	11 & 12 Sept 2 & 3 Oct 23 & 24 Oct 22 & 23 Nov	4 x 2 day workshops, access to on-line materials, 24/7 email tutor access, two mock exams	£1,800 plus VAT	7 Jan 2019
Portfolio Construction Theory London	27 & 28 Sept 18 & 19 Oct 15 & 16 Nov 13 & 14 Dec	4 x 2 day workshops, access to on-line materials, 24/7 email tutor access, two mock exams	£1,800 plus VAT	8 Jan 2019
Applied Wealth Management London	13 & 14 Sept 4 & 5 Oct 25 & 26 Oct 28 & 29 Nov	4 x 2 day workshops, access to on-line materials, 24/7 email tutor access, two mock exams	£1,800 plus VAT	8 Jan 2019
Financial Markets Edinburgh	18 & 19 Sept 9 & 10 Oct 30 & 31 Oct 4 & 5 Dec	4 x 2 day workshops, access to on-line materials, 24/7 email tutor access, two mock exams	£1,800 plus VAT	7 Jan 2019
Applied Wealth Management Edinburgh	20 & 21 Sept 11 & 12 Oct 1 & 2 Nov 6 & 7 Dec	4 x 2 day workshops, access to on-line materials, 24/7 email tutor access, two mock exams	£1,800 plus VAT	8 Jan 2019
Portfolio Construction Theory Liverpool	24 & 25 Sept 15 & 16 Oct 12 & 13 Nov 10 & 11 Dec	4 x 2 day workshops, access to on-line materials, 24/7 email tutor access, two mock exams	£1,800 plus VAT	8 Jan 2019

## REVISION COURSES

Course	Course Dates	What is included	Price	CISI exam date
Financial Markets London	22 & 23 Nov	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	7 Jan 2019
Portfolio Construction Theory London	13 & 14 Dec	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	8 Jan 2019
Applied Wealth Management London	28 & 29 Nov	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	8 Jan 2019
Financial Markets Edinburgh	4 & 5 Dec	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	7 Jan 2019
Applied Wealth Management Edinburgh	6 & 7 Dec	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	8 Jan 2019
Portfolio Construction Theory Liverpool	10 & 11 Dec	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	8 Jan 2019
Private Client Investment Advice and Management London	8 & 9 Nov	A 2 day workshop, 24/7 email tutor access from the course until exam day	£450 plus VAT	6 Dec 2018

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.

## Other support services where students do not enrol on courses:

- One to one real time tutor support - £90 plus VAT per hour
- Mock exams marked with comprehensive feedback - £125 plus VAT each
- 24/7 email tutor support - £50 plus VAT per month.

## Course Manager – Cris Glasgow, Chartered FCSI, FPFS, Chartered Financial Planner

Cris oversees all design of materials as well as tutoring a number of the Chartered Wealth Manager courses. He has been supporting people to achieve qualification success for 18 years and has been delivering Chartered Wealth Manager courses for the last 7 years. In that time, he has seen many of his students achieve awards for their performance in exams.

His experience in industry and as an examiner, question writer, tutor and author with the CISI and CII enables him to produce course materials that are innovative and results focused.

Our delegates comment that Cris is incredibly knowledgeable, supportive and explains complex information clearly and concisely drawing on real examples he has experienced.

## 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, London, Investment Manager*

‘Cris tutored me throughout all three exams that make up the CISI’s Chartered Wealth Manager Qualification. His commitment and attention to detail was second to none. The small group size ensured everyone in our local group got excellent advice and tutoring from Cris and also enabled us to learn from each other. His mock exams and personalised feedback were particularly helpful. He was always available to help with any last minute queries in the run up to the exams. With his excellent advice and tutoring I was able to pass all three exams on first attempt.’

*Charles Palin, Liverpool, Financial Markets Award Winner, 2018*

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

**[www.glasgow.co.uk/courses](http://www.glasgow.co.uk/courses) [info@glasgow.co.uk](mailto:info@glasgow.co.uk) or call us on 0203 292 9229**



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