

CISI Pension Transfers and Planning Advice Courses and Support

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 advanced level qualifications. Our CISI Premier Training Partner status is mainly due to training higher level qualifications.

Our wealth of experience in financial planning makes us ideal partners to help you work towards your Pension Transfers and Planning Advice award.

Tutor and Course Manager

Cris Glasgow, Chartered FCSI, FPFS, Chartered Financial Planner

Cris has been supporting people to achieve qualification success with CII, CISI and LIBF qualifications over the last 18 years. He has extensive experience in wealth management. As well as his industry experience, Cris has provided many CPD sessions about wealth management for the CISI.

Cris has passed the CISI Pension Transfers and Planning Advice exam and the CII AF7 Pension Transfers exam. He has delivered many CPD sessions for CISI branches about pension freedoms. In addition, Cris has passed the CISI level 7 Chartered Wealth Manager qualification.

Having been an examiner, question writer, tutor and author for the CII, CISI and LIBF, Cris has the knowledge and experience to coach people to achieve first time success.



CISI Level 6 Certificate in Pension Transfers and Planning Advice

This is a single three-hour narrative paper at Level 6. The pass mark is a minimum of 50% but is variable. It covers the following areas:

- Pensions planning and advice
- Pension transfer advice
- Financial protection
- Personal taxation
- Retirement planning and advice

Choose how you wish to study:

Support option	What is included?	Locations	Price
Revision course for the exam	1 x 2 day tutor led workshop to help candidates prepare for the narrative exam. The course revises main syllabus topics and provides lots of practise answering exam questions. 24/7 access to tutor support from the course start date up to the exam	London. 27 - 28 April 2020	£500 per delegate
Email support only	24/7 email access to a tutor	N/A	£50 per month
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£90 per hour

VAT, CISI fees, exam entrance and course book are not included. Courses are subject to a minimum of five delegates. Courses can be delivered in-company. Please contact us to arrange.

'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



**For course dates and to book, go to www.glasgow.co.uk/courses
To discuss your requirements, call us on 0203 292 9229 or
email us at: info@glasgow.co.uk**