

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:

Our courses are currently being delivered by Zoom. This enables us to deliver fully interactive workshops in the same way as our face to face sessions. We can show slides, use a whiteboard, set up syndicate group work and you'll receive a recording to refer back to. We limit our courses to twelve delegates to ensure we provide the highest level of support.

Support option	What is included?	Dates	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	9 & 10 May	£500 per delegate
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£110 per hour

VAT, CISI fees, exam entrance and course book are not included. Courses are subject to a minimum of five delegates.

'The Pension Transfers revision course was highly informative and well structured including time to practice past questions. The mock exam provided was also very useful and very detailed answers. What has also impressed me is the speed and quality of response from Cris to technical questions which I have asked following my attendance on the course. I believe that Cris's help was instrumental towards me achieving a pass particularly as I had no practical experience in the subject.'

Richard Beard, Relationship Director



**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**