glascow
financial services training

Winter 2020

CISI Private Client Investment Advice and Management 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 Private Client Investment Advice and Management award.

Tutor and Course Manager

Cris Glascow, 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 PCIAM exam and has supported a number of people to succeed since the qualification was introduced. He has also completed the CISI's Chartered Wealth Manager qualification at level 7.

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 PREMIER TRAINING PARTNER

CISI
CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

TELEPHONE: **0203 292 9229** EMAIL: **INFO@GLASCOW.CO.UK** WEB: **WWW.GLASCOW.CO.UK**

CISI Level 6 Certificate in Private Client Investment Advice and Management

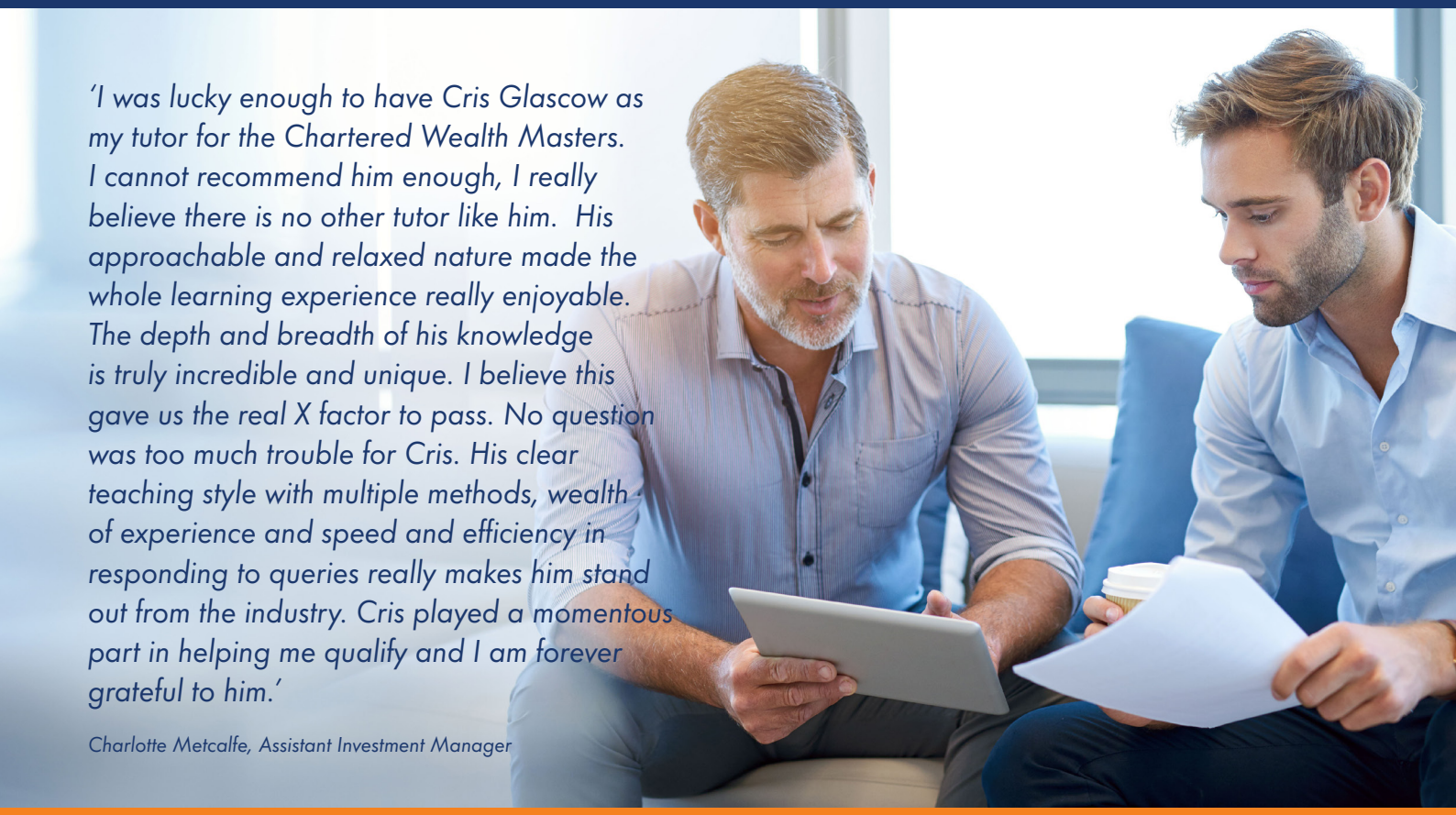
This is a single three-hour narrative paper at Level 6.
The pass mark is a minimum of 50% but is variable. It covers the following areas:

- Financial Advice within a Regulated Environment
- Investment Taxation
- Trust and Trustees
- Principles of Finance Advice
- Financial Instruments and Products

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. 13-14 May 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.



'I was lucky enough to have Cris Glascow as my tutor for the Chartered Wealth Masters. I cannot recommend him enough, I really believe there is no other tutor like him. His approachable and relaxed nature made the whole learning experience really enjoyable. The depth and breadth of his knowledge is truly incredible and unique. I believe this gave us the real X factor to pass. No question was too much trouble for Cris. His clear teaching style with multiple methods, wealth of experience and speed and efficiency in responding to queries really makes him stand out from the industry. Cris played a momentous part in helping me qualify and I am forever grateful to him.'

Charlotte Metcalfe, Assistant Investment Manager

For course dates and to book, go to www.glascow.co.uk/courses

To discuss your requirements, call us on 0203 292 9229 or email us at: info@glascow.co.uk