

CISI Investment Advice Diploma Training

As a CISI Premier Training Partner and specialists in CISI qualifications, we offer the highest opportunities for examination success.

Our expert tutors work closely with small groups to support them to prepare for the exams. We create engaging learning environments in our workshops and get to know our delegates well. After each workshop, delegates have 24/7 email tutor access up to exam day and we provide detailed answers within 24 hours.

People who complete their IAD qualification with us will have the background knowledge and study skills to make the step up to higher level exams such as those within the CISI's Chartered Wealth Manager qualification.

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 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.



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
- Financial Planning and Advice
- Retail Advice and Planning

Each unit is assessed by a computer based exam. All exams comprise of 80 multiple choice questions apart from Financial Planning and Advice which comprises of 80 multiple choice, multiple response and case study questions.

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!

Choose how you wish to study:

Support option	What is included?	Locations	Price
Revision course for each 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 practice answering exam questions. 24/7 access to tutor support from the course start date up to the exam.	Delivered as in-company courses at client venues.	£450 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. Training locations will be agreed with clients.

'I was lucky enough to have Cris Glasgow 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

'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



**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**