

## CISI Financial Planning 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 highly qualified 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 Certified Financial Planner award.

### Lead tutor and Course Manager

*Cris Glasgow, CFP™, Chartered FCSI, FPFs.*

Cris has been supporting people to achieve qualification success with CII, CISI and LIBF qualifications over the last 20 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 Investment Advice Diploma including the Financial Planning and Advice exam, CISI Private Client Investment Advice and Management, Pension Transfers and Planning Advice and the level 7 Chartered Wealth Manager qualification. He took the pilot CISI Level 6 Certificate in Advanced Financial Planning and was awarded a distinction. Cris has passed the level 7 Financial Plan case study and is Certified Financial Planner.

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.

In the 2022 CISI examination awards, Cris was delighted to have coached one of the two highest score award winners for the CFP Case Study.



## CISI Level 4 Financial Planning and Advice

This is one of the non-compulsory units forming part of the CISI's Level 4 Investment Advice Diploma. It is a 2-hour paper comprising 80 multiple choice questions with a pass mark of 70%. It covers the important areas of protection, retirement planning and the financial advice process.

### 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 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.	Online via Zoom. Please go to: <a href="http://glasgow.co.uk/courses">glasgow.co.uk/courses</a> for the next available open course.	£450 per delegate
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£110 per hour

## CISI Level 6 Certificate in Advanced Financial Planning

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:

- The financial planning process
- Existing provisions for realising objectives
- Retirement and estate planning
- Risk management
- Financial and budgetary management
- Creating a financial plan

### Choose how you wish to study:

Support option	What is included?	Dates	Price
Revision course for the exam	1x2 day tutor led workshop covering the main syllabus areas and providing lots of practise answering exam style questions enabling you to fine tune your exam technique. 24/7 access to tutor support from the course up to the exam date.	8 & 9 August 2024	£500 per delegate
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£110 per hour

## CISI Level 7 Diploma in Advanced Financial Planning

This is an assessment at Level 7. To pass, the candidate must satisfactorily complete a financial planning report and recommendations relative to a specific client case study provided by the CISI. The report will be assessed independently and will either be assessed as a pass or fail. If the latter, the candidate will have two further attempts to complete the report to a pass standard, after which a new case study will need to be attempted.

### Choose how you wish to study:

Support option	What is included?	Locations	Price
Revision course for the exam	We offer bespoke support for this assessment on a 1:1 basis. Our basic package provides 6 hours help at a rate of £110 per hour. The package includes: Meeting 1 - an hour long meeting to discuss the approach and agree objectives. Meeting 2 - an hour long meeting to review progress and to discuss areas requiring further work in order to complete the plan. Meeting 3 - a final meeting to iron out any concerns prior to submission deadline. The fee for six hours includes time for us to read your work and assess it.	By arrangement	£660 per delegate
Further 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. Courses can be delivered in-company. Please contact us to arrange.

*'I attended a 2 day workshop in London with Cris in preparation for the first sitting of the new CISI Level 6 Certificate in Advanced Financial Planning exam (March 2020). Having come from doing CII exams Cris was able to clearly explain how the CISI exams differ and guide me through the key parts of the syllabus. His style of teaching had the right balance of intensity and detail without overloading or confusing me and I left feeling in a much more confident and focused position. As a result I passed the exam with Merit and would have no hesitation in recommending Cris to anyone looking to improve their chances of passing.'*

*Mark Robinson, Director & Chartered Financial Planner*

*'Our firm has worked with Glasgow Training for several years now, during which time we have called on Cris's considerable expertise numerous times. Cris has coached CISI exam candidates at all levels and the results have been excellent. The feedback from colleagues who have sought assistance has always reflected his excellent knowledge of both the technical topics and of exam craft. As a training manager I particularly value Glasgow Consulting's responsiveness and flexibility in providing us solutions that fit our needs and Cris's insight and advice is highly recommended.'*

*Dan Roddy, Training & Development Manager, Rowan Dartington*

*'Cris supported me through the CISI Level 7 Diploma in Advanced Financial Planning and the CISI Level 7 Diploma in Wealth Management. His knowledge of the syllabus and the financial services industry is fantastic and the way in which he taught the course material was always extremely engaging and practical. He was quick to respond to all my questions and clarify anything I didn't quite understand, whilst providing extensive learning material to work through. My level of confidence approaching the exams after working with Cris was far superior to when I had approached exams preparing either alone or with other training providers. I would without doubt recommend to anyone wanting to pursue exams with the CISI to get in touch with Glasgow consulting and start working with Cris.'*

*Ben Bolger, Senior Financial Planner*



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