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

In addition to his comprehensive industry experience, Cris has supported people to achieve qualification success with the CII, LIBF and CISI over the last 22 years.

Cris has passed the CISI PCIAM exam and has supported a number of people to succeed since the qualification was introduced. He is qualified to level 7 in both investment management and financial planning by completion of the CISI Chartered Wealth Manager qualification and the CISI Diploma in Advanced Financial Planning. 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 CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT PREMIER TRAINING PARTNER

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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

Why choose to study PCIAM with us?

Our experience tells us that study at this level needs to be in a small group with a dedicated tutor where you can interact easily with each other. We teach the syllabus and coach our delegates to answer exam style questions from the beginning of the course.

All of our comprehensive courses are designed with this in mind because we know it works and it prepares people to walk into the exam room with confidence.

- Study in a small group with a maximum of 12 people
- Work with a tutor who will get to know you and is dedicated to helping you succeed
- Your tutor will have the PCIAM qualification themselves and will also be level 7 qualified in financial planning and investment management.
- Your tutor will have good industry experience as well as knowing how to coach you to pass the exam.
- Keep in contact with your tutor right up to the exam and email queries at any time.
- Join a WhatsApp group with other people on the course for study support if you wish
- Use our online materials to support your study between workshops
- We start applying your knowledge to exam questions from day one so that you practise questions from the beginning of the course.
- We will ask our comprehensive course delegates to complete a full past paper between workshops 3 and 4 and we'll mark it with detailed feedback because we feel this is vital exam preparation.

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.

COMPREHENSIVE COURSE:

Course	Course Dates	What is included?	Price
CISI Private Client Investment Advice and Management	30-31 August 14-15 September 12-13 October 2-3 November	4 x 2 day zoom workshops that are recorded for you to refer back to. Email tutor support. Online materials. Student WhatsApp group if you wish to join. Full past paper marked with detailed feedback.	£2,000 per delegate.

Fees exclude VAT, all CISI fees and course textbooks. Courses are subject to minimum numbers.

REVISION COURSE:

Course	Course Dates	What is included?	Price
CISI Private Client Investment Advice and Management	2-3 November	1x2 day zoom workshop that is recorded for you to refer back to. This course recaps main syllabus areas and concentrates on exam technique to maximise marks. Email support after the workshop until exam day. This course is for people who have completed the study for the exam and is for revision and exam technique only	£500 per delegate.

Fees exclude VAT, all CISI fees and course textbooks. Courses are subject to minimum numbers.

We also provide one-to-one support for people who don't wish to attend a course. The fee for this is £110 per hour plus VAT.

'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