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financial services training

CISI Chartered Wealth Manager (CWM) courses - Winter 2026

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 the Chartered Wealth Manager qualification.

Tutor and Course Manager

Cris Glascow, CFP™, Chartered FCSI, FPFS, Chartered Financial Planner

Cris has been supporting people to achieve qualification success with CII, CISI and LIBF qualifications over the last 25 years.

He has passed the CISI Chartered Wealth Manager qualification and has been teaching people for these exams for 15 years. In that time, Cris has seen many of his delegates achieve prestigious awards. In addition, Cris regularly takes exams to keep up to date. He took the pilot CISI Level 6 Certificate in Advanced Financial Planning and achieved a distinction. He also passed the CISI's Level 7 financial planning case study analysis and report first time. Delegates often comment that Cris is incredibly knowledgeable, supportive and explains complex information clearly and concisely.

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 2025-26

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What is the Chartered Wealth Manager Qualification?

It is the CISI's top investment management award and is a postgraduate level 7 qualification. It is very well regarded and demonstrates the highest level of competence in developing investment portfolios and wealth planning for clients.

It is comprised of three units:

- Financial Markets
- Portfolio Construction Theory
- Applied Wealth Management

You must meet the CISI entry requirements to achieve the award. Details of any exemptions are listed on the CISI website.

Why choose to study with us

- We are a CISI Premier Training Partner demonstrating we meet the highest quality standards set by the CISI.
- We are qualification specialists and have been supporting people to achieve examination success for the last 25 years.
- We limit our class sizes to a maximum of 12 delegates.
- We provide expert tuition focused on exam preparation from day one.
- On-line materials provide course slides, notes, practice exam questions, past exam papers, additional exercises, videos covering the more complex areas and podcasts.
- Our comprehensive course delegates benefit from two mock exams to prepare them for exam day.
- We carefully review all past exams and syllabus reviews to ensure our course materials and mock exams prepare you for exam success.
- We achieve pass rates higher than national averages in each exam sitting.
- Our flexible approach to individual support when needed is appreciated by our clients.
- Our comprehensive course delegates also have ongoing tutor support.
- We offer a free revision course for anyone who is unsuccessful in the exam, subject to terms and conditions.

COMPREHENSIVE COURSE DATES:

Our courses are currently being delivered by zoom. Zoom enables us to offer fully interactive workshops delivered in the same way as our face to face sessions. We can show slides, use a whiteboard, arrange syndicate group work and answer questions as well as providing a recording for you to refer back to. In addition to our courses, we provide each delegate with extra support and coaching for the exam, this includes two marked assignments and two mock exams as well as three half hour 1:1 tutorials if required and email support.

Course	Course Dates	What is included?	Price
Financial Markets	1&2 September 21&22 September 12&13 October 29&30 October	4 x 2 day workshops, access to on-line materials, email tutor access, two mock exams	£2,860 + VAT
Portfolio Construction Theory	7&8 September 28&29 September 19&20 October 2&3 November	4 x 2 day workshops, access to on-line materials, email tutor access, two mock exams	£2,860 + VAT
Applied Wealth Management	10&11 September 28&29 September 22&23 October 12&13 November	4 x 2 day workshops, access to on-line materials, email tutor access, two mock exams	£2,860 + VAT

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

REVISION COURSES:

Course	Course Dates	What is included?	Price
Financial Markets	29&30 October	A 2 day workshop, email tutor access from the course until exam day	£580 + VAT
Portfolio Construction Theory	2&3 November	A 2 day workshop, email tutor access from the course until exam day	£580 + VAT
Applied Wealth Management	12&13 November	A 2 day workshop, email tutor access from the course until exam day	£580 + VAT
One-to-one support	Support from a tutor as agreed to meet individual needs	By arrangement	£120 per hour + VAT

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

Other support services where students do not enrol on courses:

- One to one real time tutor support - £120 plus VAT per hour
- Mock exams marked with comprehensive feedback - £125 plus VAT each

What do our clients say about us?

'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, Investment Manager

'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 Glascow consulting and start working with Cris'

Ben Bolger, Senior Financial Planner

'I was very fortunate to have Cris Glascow's support through the CISI Chartered Wealth Manager qualification. Cris really is an expert in his field and has an extremely deep understanding of the subject matter. No questions were left unanswered and he wastes no time responding to queries. The small class sizes made for an interactive and collaborative learning environment where I never felt unable to ask questions. He was always available and tailored the sessions, particularly in the run up to exams, to areas the class felt needed more attention. Without Cris's support the process would not have been so smooth. Thank you.'

Bertie Grossart, Trainee Investment Manager

Highlights of recent results:

June 2025 Comprehensive courses

FM 100% pass rate. National pass rate 54%

PCT 100% pass rate. National pass rate 63%

AWM 86% pass rate. National pass rate 69%

December 2024

PCT 100% pass rate. National pass rate 79%

AWM 100% pass rate. National pass rate 70%

June 2024

Financial Markets Comprehensive course 100%, 88% overall including revision support. National pass rate 65%.

Portfolio Construction Theory 75%. National pass rate 65%.

Applied Wealth Management 80%. National pass rate 59%.

December 2022

Financial Markets comprehensive course 100% pass rate

Portfolio Construction Theory 77% pass rate

June 2022

Applied Wealth Management 100% pass rate.

December 2021

Applied Wealth Management 91% pass rate with a large cohort

June 2021

Portfolio Construction Theory 100% pass rate

Applied Wealth Management 100% pass rate

2020

September 2020 exams

Financial Markets 86% pass rate overall. 100% pass rate for comprehensive course delegates.

Portfolio Construction Theory 100% pass rate.

Applied Wealth Management 80% pass rate overall.

2019

Above average pass rates for all Chartered Wealth Manager exams including a 100% pass rate for Financial Markets comprehensive course delegates in January 2019.

2018

100% pass rate for Financial Markets comprehensive course delegates June 2018 sitting.

100% pass rate for Applied Wealth Management June 2018 sitting.

2017

Above average pass rates for Financial Markets in both sittings. We achieved the only merits nationally for Financial Markets in December 2017.

First time passes for 14 of our 15 Portfolio Construction Theory June 2017 comprehensive course delegates.

First time passes for 14 of our 16 Applied Wealth Management December 2017 comprehensive and revision course delegates – 30% higher than the national pass rate.

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