

# Certificate in Financial Planning - CertPFS

**15 DAYS**

Hands on, Tutor-Led training in:

**Bank, City of London**

The Certificate in Financial Planning reflects the commercial realities of the market. The qualification will develop your knowledge and understanding of regulatory issues, the mechanics and purpose of the main investment products on offer and the process of giving advice to clients.



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# Certificate in Financial Planning – CertPFS

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The Certificate in Financial Planning reflects the commercial realities of the market. The qualification will develop your knowledge and understanding of regulatory issues, the mechanics and purpose of the main investment products on offer and the process of giving advice to clients. It also addresses the subject of investment and risk, an area highlighted in recent years as a weakness on the part of many existing financial advisers. Holders can apply to use the designation 'CertPFS'.

## Course Contents

The course is structured as 5 modules. These are:

- CF1: UK Financial Services Regulation and ethics
- CF2: Investment and risk
- CF3: Financial Protection
- CF4: Retirement Planning
- CF5: Integrated financial Planning

## Examinations

From 2007, UK Certificate exams will be delivered and tested online (with the exception of unit CF5 which, as a written exam, will continue to be offered at centres in January, April, July and October). 5 exams in total will need to be taken and passed in order to achieve CERTPFS qualification, 1 exam for each of the CF modules 1-5.

## Value Added Tools

We are consistently adding various products, without any charge to the student, to enhance both the delivery of the course and the learning of our students. The student is provided with:

- Revision Guides
- Mock Exam papers
- Interactive CD
- Supplementary Coursework

## Formalities and Recognition

**Offered/Awarded by:** Chartered Insurance Institute (CII).

[www.cii.co.uk](http://www.cii.co.uk)

**Accredited By:** Qualifications and Curriculum Authority (QCA).

[www.qca.org.uk](http://www.qca.org.uk)

**NQF Level:** National Qualifications Framework Level 3.

[www.qca.org.uk](http://www.qca.org.uk)

**Recognition:** Recognised by the Financial Services Authority (FSA) as an appropriate qualification.

[www.fsa.gov.uk](http://www.fsa.gov.uk)

**Further Information:** It meets the requirements identified by the Financial Services Skills Council (FSSC).

[www.fssc.org.uk](http://www.fssc.org.uk)

## The Training

Your success lies in you dedicating time to prepare for the course, by self studying prior to the course start date. The courses are held by our in house tutors who each have a minimum of 25 years experience in the Financial Services industry. The course will include formal lecture training, workshops, case studies and practice examinations.

## Key benefits

- Free retake option (Terms and Conditions apply)
- Access to your tutor for post course questions and help
- Structured revision sessions to help you prepare for your exam
- Additional revision materials to help you

CertPFS 15 days: