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Certified Financial Planner (CFP™)

Why study the level 7 Diploma in Advanced Financial Planning?

If you want the confidence of knowing you will change your clients' lives for the better by the quality of the service you provide, this is the qualification that will help you create that difference. It's your route to building long term relationships with clients based on trust. Get that right and clients are not only willing to pay for such a service but also to refer you to their friends and colleagues.

It's also the route to the highest global certification available to financial planners in the UK - the CERTIFIED FINANCIAL PLANNER™ certification.

Who should study the Diploma in Advanced Financial Planning?

If you want to become a CFP professional, this is the first step. If you're looking to elevate your financial planning skills, this qualification will help you demonstrate your understanding of the principles of financial planning and how to analyse and apply your techniques to realistic, practical examples.

Key features

- **Specialist qualification** – obtain the CFP certification – considered the gold standard certification for financial planners, globally
- **Free CISI student membership** – take advantage of an extensive range of professional benefits and become associated with the leading professional body for financial planning professionals
- **Access to designatory letters** – on successful completion of the qualification, you can apply to become a Member (MCSI) of the Institute, allowing you to use the letters MCSI after your name
- Exams available online via **remote invigilation** or at one of our **global test centres**

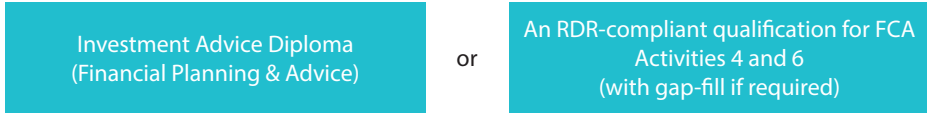
How is the qualification structured?

The qualification consists of two parts, an exam and a case study, which must be achieved in this order:



Entry requirements

To be eligible to start this qualification, you must first hold an RDR-compliant qualification for FCA Activities 4 and 6 (with gap-fill if required). This can be either:



Exemptions

An exemption from the level 6 Certificate in Advanced Financial Planning exam is available to holders of the full CISI level 6 Diploma in Financial Planning.

After an exemption is obtained, you will only need to complete the level 7 Financial Plan Case Study to achieve the level 7 Diploma in Certificate in Advanced Financial Planning. Contact fpexams@cisi.org for more information.

Syllabus Summary

Certificate in Advanced Financial Planning

- The financial planning process
- Financial planning principles
- Financial management
- Tax principles and optimisation
- Investment planning/asset management
- Risk management and insurance planning
- Retirement planning
- Estate planning and wealth transfer

Financial Plan Case Study

- Financial management
- Applied tax planning
- Asset management
- Personal risk management
- Retirement planning
- Estate planning
- Applied financial planning

Learning materials and resources

Here are some of the first-class resources that will be available to you if you choose to study with us.



Workbook and ebook | Elearning videos | Revision Express | Optional Training Courses

Study hours

Level 6 Certificate in Advanced Financial Planning Exam: 200 hours recommended
 Level 7 Financial Plan Case Study: 200+ hours recommended

Next steps

Starting the qualification

The first step to starting this qualification is to confirm that you meet the entry requirements.

To check your eligibility, please contact us:
Email fpexams@cisi.org

For further information, visit our website.
Online cisi.org/dafp

Become a CERTIFIED FINANCIAL PLANNER professional

Following successful completion of the level 7 Diploma in Advanced Financial Planning, you can apply to the CISI to become a CFP professional, subject to meeting the other CFP requirements. For more information visit cisi.org/cfp