

CONGRATULATIONS



CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT

Our 2018 qualification award winners

The Chartered Institute for Securities & Investment (CISI), the leading professional body for the securities, investment, wealth and financial planning profession, provides globally-recognised qualifications and membership for financial services practitioners. Each year, we hold an awards ceremony to recognise the outstanding achievements of our top-scoring students. This year, we celebrated successes from the UK and globally, with winners from Botswana, Egypt, India, Mauritius, the Philippines, Poland, Spain, Tunisia and the UAE. Below, we recognise this year's award winners.

WEALTH MANAGEMENT / FINANCIAL PLANNING

Chartered Wealth
Manager Qualification

Alex Waddington,
Chartered MCSI
*Smith & Williamson
Investment Management -
London*

Applied Wealth
Management

David Guckian MCSI
Brewin Dolphin

Financial Markets

Joshua Herson MCSI
Saunderson House

Portfolio Construction
Theory

Callum Wells, Chartered
MCSI
Brown Advisory

Private Client
Investment Advice &
Management

Annie Cross
Barclays Bank UK

Financial Plan
Assessment

Paul Simmons CFP™ MCSI
Mazars Financial Planning

Pension Transfers &
Planning Advice

Stuart Robinson, Chartered
MCSI
Royal Bank of Scotland

International
Certificate in
Advanced Wealth
Management

Federico Lovat

Investment Advice
Diploma

Lucie Hughes ACSI
Schroder & Co.

Certificate in Wealth
Management (Spain)

Pedro Real de Asúa Guinea
CaixaBank ("La Caixa")

International
Certificate in Wealth
& Investment
Management

Paula Montalt Delgado

Carlos Rodríguez Alija
Caja Rural de Navarra

Alex Mendoza
García

Caja Rural de Navarra

CORPORATE FINANCE/ CAPITAL MARKETS

Diploma in Corporate
Finance

Zoë Nateras

Bond & Fixed Interest
Markets

Christopher Minck MCSI
*BlackRock Investment
Management (UK)*

Financial Derivatives

Thomas Cullen
Barclays Bank UK

Fund Management

Daria Plotnikova
Killik & Co

William Rosier ACSI
Hargreave Hale

Capital Markets
Programme

Ferdinand Danner
UBS Wealth Management

Ieuan Williams
Barclays Capital

Certificate in
Corporate Finance

Michael Lagler
Perella Weinberg Partners UK

RISK AND COMPLIANCE

Euroclear Prize in
Memory of Andrew
Winckler: Diploma
in Investment
Compliance

Danielle Waterman MCSI
RPMI

Compliance Institute
Award: Regulation &
Compliance

Danielle Waterman MCSI
RPMI

Combating Financial
Crime

Bethany Telfer
Brewin Dolphin

Global Financial
Compliance

Victoria Roberts

Risk in Financial
Services

James Dawson

Andrew Lynn
Amati Global Investors

OPERATIONS

Diploma in Investment
Operations

Thomas Oakman MCSI
*Jarvis Investment
Management*

Global Operations
Management

Julie Hedley,
Chartered MCSI
Brewin Dolphin

Advanced Global
Securities Operations

Max Rayner
Delmore Asset Management

Managing Operational
Risk in Financial
Institutions

Cathrina Michaela Sinlao
ACSI
*HSBC Electronic Data
Processing Philippines*

In honour and memory
of Pen Kent FCSI(Hon):
Investment Operations
Certificate

Ewa Kurkowska

IT in Investment
Operations

Samuel Clatworthy
Schroder & Co.

Sunil Kotian

ISLAMIC FINANCE

Islamic Finance
Qualification

Ali Akram

Tounsi Hela
*Institut de Formation de la
Bourse de Tunis - IFBT*

Fundamentals of
Islamic Banking &
Finance

Sari Alsalem

FOUNDATION

Introduction
to Investment:
The Foundation
Qualification

Daniel Beecroft
Charles Stanley & Co

Sarah Coussons
A J Bell

Edwin Davies
*Aberdeen Asset
Management*

Amy Rumble
*Morgan Stanley & Co
International*

Rebecca Shaw
Elevate

Richard Guy Short
Invesco Perpetual

Palmer Stubbings
SS&C

International
Introduction to
Investment

Oshotse Aliu

Prakash Ibite

Keolebogile Kgololo

Jeroen van der Klaauw

Fundamentals of
Financial Services

Radwa Alaa
Emirates NBD Egypt

Ezzeldin El Badry
Emirates NBD Egypt

Jessica Deedat-Nettel

Jennifer Ellis

Olivia Garner

Jeremy Jenkins
Velocity Capital Markets

Mayuri Jhoomuck
Pivot

Konstantinos Lekkas

Ma. Regina Macaranas
University of Santo Tomas

Ellis Stobo
Speirs & Jeffrey

Aleck Gwen Valdez
University of Santo Tomas

Madhulika Vyas

Thomas Wilkinson

Oliver Wright
Stewart's Melville College

SCHOOLS, COLLEGES AND UNIVERSITIES

Diploma in Finance,
Risk & Investment

Maisy Salsbury
*Simon Langton Grammar
School for Boys*

Certificate for
Introduction to
Securities & Investment
(Schools)

Raphael Mizrahi
*City of London School for
Boys*

Certificate in Finance,
Risk & Decision Making

Mason Humphris-Day
Coopers School

Introduction to
Investment (Education)

Simon Watterson
University of Ulster

Educational Trust
Award 2018/19
- Top Performing
Postgraduate

Akshat Vyas
*ICMA Centre, Henley
Business School, University
of Reading*

Educational Trust
Award 2018/19
- Top Performing
Undergraduate

Luke Mulligan
University of Ulster