Certificate in Paraplanning

What is the Certificate in Paraplanning?
The Level 4 Certificate in Paraplanning was developed in conjunction with Paraplanners, Financial Planners and trainers to test the application of skills and the technical knowledge needed by Paraplanners.

If you are currently working as a Paraplanner, whether in-house or outsourced, the qualification will help you by building on your existing skills and enable you to become more efficient in your job. If you are thinking of becoming a Financial Planner in the future, then this is an ideal step towards CFP® certification as it covers some of the core competences tested as part of this globally recognised qualification.

Who should study the qualification?
The Certificate in Paraplanning is the ideal qualification for individuals who are currently practising as a Paraplanner in the UK.

It’s a challenging and relevant qualification which is designed to further develop and test your financial planning skills and how well you can apply technical knowledge in Financial Planning situations. Success in the exam also provides powerful professional recognition that you have the appropriate combination of technical knowledge and planning skills required to fulfil the role of Paraplanner.

Key features
- **Specialist qualification** - an ideal step towards obtaining CERTIFIED FINANCIAL PLANNERTM certification – the global standard of excellence in financial planning
- **Free CISI Student membership** – become associated with a Chartered professional body and take advantage of an extensive range of benefits, including the CISI IFP Forum
- **ACSI designatory letters** – you will be eligible for ACSI membership of the Institute upon successful completion of the Certificate in Paraplanning
- **Apply to become an Accredited ParaplannerTM** – differentiate yourself as a qualified Paraplanner and gain professional recognition with peers and clients

Ofqual approval
The Certificate In Paraplanning is regulated by Ofqual (on its Regulated Qualifications Framework) as the CISI Level 4 Certificate in Paraplanning. The Total Qualification Time for this qualification is 263 hours. Visit cisi.org/ofqual

On the European Qualifications Framework this equates to a level 5 qualification. For further information on the European Qualifications Framework, please visit cisi.org/eqf

“I feel that my APP designation demonstrates that I have a greater commitment to the profession by seeking to go above and beyond the minimum requirements to establish my financial planning knowledge.”

Farida Hassanali CFP APP Chartered FCSI, Jarrovian Wealth
How is the qualification structured?

The qualification is achieved by passing two units (below). Visit cisi.org/cpp for full syllabus and unit details.

Financial Planning & Advice + Investment Risk & Taxation = Certificate in Paraplanning

Studying for the Certificate in Paraplanning

Financial Planning & Advice

This multiple choice question (MCQ) exam is computer based, consists of 80 questions and lasts 2 hours and 30 minutes. We recommend a minimum of 180 hours study and upon successful completion you will be awarded 10 CPD hours.


Investment Risk & Taxation

This multiple choice question (MCQ) exam is computer based, consists of 80 questions and lasts 2 Hours. We recommend a minimum of 140 hours study and upon successful completion you will be awarded 8 CPD hours.


A CISI workbook is available and is required to be purchased when booking each exam. This is to ensure there is one standard workbook from which all exam candidates can prepare. You can also choose to purchase CISI elearning to support your exam preparation. You can also choose to complete formal training for our exams with a CISI Accredited Training Partner (ATP). To find an ATP near you visit cisi.org/atp

Book your exam

Online cisi.org/cpp
By phone +44 20 7645 0777
Via email customersupport@cisi.org

Don’t forget to set your results preferences afterwards at cisi.org/resultsdashboard

Visit cisi.org/prices for current prices

CISI Membership

Upon successful completion of the Certificate you will be eligible to become an Associate member of the Institute and utilise the designatory letters, ACSI. CISI membership enables you to develop your career, increase your competence and maintain the highest standards of personal integrity. Visit cisi.org/membership

Become an Accredited Paraplanner™

Once you have achieved the Certificate in Paraplanning and have upgraded your membership to Associate level or above, you can apply to become an Accredited Paraplanner™. Visit cisi.org/app for more information.

Criteria for becoming an Accredited Paraplanner

CISI Certificate in Paraplanning (Exemptions are available, see below) + Associate member of the CISI or above + Annual CPD requirement 35 hours + Financial Planning and Paraplanning professional refresher modules to be passed on application

Qualification Exemptions

CII - Certificate in Paraplanning or any level four qualification; Pensions Management Institute - Diploma in Regulated Retirement Advice; Chartered Banker – Diploma in Professional Financial Advice; London Institute of Banking and Finance - Diploma for Financial Advisers