

CERTIFIED FINANCIAL PLANNER (CFP™)

(Diploma in Financial Planning)



Why study the Diploma in 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.

Who should study the qualification?

The CISI Diploma in Financial Planning represents a challenging test of your technical ability by examination, but also assesses how well you can apply this knowledge in order to produce an effective financial plan - your planning skills.

Key features

- **Specialist qualification** – obtain the CERTIFIED FINANCIAL PLANNER™ 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
- **MCSI designatory letters** – you will be eligible to apply for full Membership (MCSI) of the Institute upon successful completion of the qualification

I have passed numerous professional exams over the years but the CFP™ certification stands head and shoulders above them all in terms of value to myself, my business and most importantly my clients too."

Alan Dick CFP™ Chartered FCSI,
Forty Two Wealth Management, Glasgow



CHARTERED INSTITUTE FOR
SECURITIES & INVESTMENT



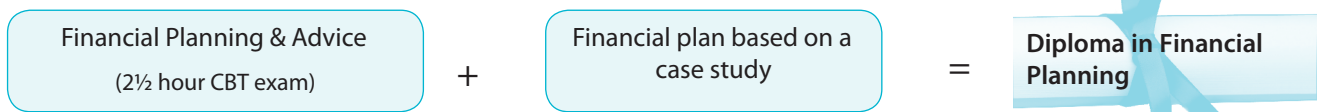
How is the qualification structured?

To be eligible to register for this qualification, at least one of the following requirements must be met:

- a) An RDR-compliant qualification (with gap-fill if necessary) b) A current and valid SPS.

For further information email FPexams@cisi.org

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



Syllabus Summary

Principles of Financial Planning & Advice

- Financial protection
- Retirement planning
- Financial planning

Financial Plan based on a case study

Candidates are supplied with a case study which outlines client circumstances. The client(s) to be advised are either retired or pre-retired. A confidential questionnaire is also supplied with the case study which provides further information.

Candidates should prepare a financial plan for the clients on the basis of the information provided in the case study. Visit cisi.org/dfp for more information.

Studying for the Diploma in Financial Planning

Financial Planning & Advice – 180 study hours recommended.

You can choose to self-study for the exams using CISI workbooks and elearning or have formal training with one of our Accredited Training Partners (ATP). To find an ATP near you visit cisi.org/atp

Financial Plan based on a case study – 400-800 study hours recommended.

There is an intensive one day workshop and elearning package designed for candidates who have already passed the Financial Planning & Advice exam and are about to start the process of preparing their financial plan in response to the case study element of the Diploma in Financial Planning. Visit cisi.org/dfpstudy for more information.

MyStudy

The CISI has a variety of tools and information available to help you in the preparation for sitting your exam. You can find sample papers, study tips and exam information - all located in one place, visit cisi.org/mystudy

How to register

Step 1: Register online at cisi.org/register

Step 2: Book your exams:

online – cisi.org/dfp

by phone – +44 20 7645 0777

via email – customersupport@cisi.org

Step 3: Complete the Qualifications

Registration Form at cisi.org/qrf

Visit cisi.org/prices for current prices

Next steps

CISI Membership

Upon successful completion of the Diploma you will be eligible to become a full Member of the Institute and utilise the designatory letters, MCSI. CISI membership enables you to develop your career, increase your competence and maintain the highest standards of personal integrity. Visit cisi.org/membership

Become a Certified Financial Planner™ professional

Following successful completion of the Diploma in Financial Planning, you can apply to the CISI to become a CERTIFIED FINANCIAL PLANNER™ professional and use the CFP™ marks subject to certain criteria being met. Visit cisi.org/cfp