

Assessment Submission Form

Please submit this form with your financial plan for assessment to:

Jamie Britton
Qualifications Executive
CISI
20 Fenchurch Street
London
EC3M 3BY

Your plan should be submitted as a hard copy in a type-written format **and** an electronic copy must also be sent via email to: fpexams@cisi.org or included with your plan on a disk / memory stick. Please indicate as below.

You should not submit any product specific details, illustrations or other requirements of a purely compliance nature with your plan.

You **must not** include your name or the name of your company anywhere on the plan. **Plans will be returned unmarked if you do not comply with this instruction.**

Please note that if you are submitting your financial plan between 5 April and 31 July you can either use the preceding or current tax year basis for your calculations. Please state which tax year you are using on the front of your plan.

Enclosure checklist

Submission

- A bound type-written hard copy of your Financial Plan
- An electronic copy of your plan () Emailed on / / or () Enclosed
- Fact find and file notes
- Completed booking form for assessment fee

It should be noted that if your financial plan should fail the assessment process, there will be a further charge of £156 for the re-assessment of any failed sections of the plan.

Candidate statement:

I confirm that I have three years' relevant experience and give details of this below (please print clearly):

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Details of training and / or mentoring undertaken before and during preparation of the financial plan:

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I confirm that I am the author of the attached financial plan and that the submitted entry is entirely my own work.

Signature

Name

Date