

Examination Results

The Chartered Institute for Securities & Investment (CISI) congratulates all those named below on their successful completion of CISI narrative exams, sat in autumn 2023. The CISI is the leading professional body for securities, investment, wealth and financial planning professionals. Advanced postgraduate professional level qualifications are internationally recognised and are designed by senior practitioners to meet the needs of the financial services sector. Completion of these qualifications leads to full Membership (MCSI) and, eventually, individual Chartered status either as a Chartered Member or a Chartered Fellow. The Level 6 Certificate in Advanced Financial Planning and the Level 7 Financial Plan Case Study also lead to the highest global certification available to financial planners in the UK - the CERTIFIED FINANCIAL PLANNER™ certification.

Level 7 Financial Plan Case Study

Rupal Chohan CFP™ Chartered FCSI
Anthony Fowler, Chartered FCSI
David Henry MCSI
Jonathon Jay CFP™ Chartered FCSI
Angela McAfee MCSI

Claire McGuinness CFP™ MCSI
Jessica Rooney MCSI
Emma Rutter, Chartered FCSI
Matthew Scott MCSI

Level 6 Advanced Financial Planning

Thomas Cashman		Charlene Love MCSI	
Ellen Cornelious, Chartered FCSI	Merit	Jake Robinson	
George Cowley ACSI		Matthew Seaborne-Hall, Chartered FCSI	
Lucas Gaynor, Chartered FCSI		Blake Sibley, Chartered FCSI	
Graham Greenidge ACSI		Andrew Taylor, Chartered FCSI	
Rory Lees-Millais, Chartered FCSI	Distinction	William Trayford, Chartered MCSI	Distinction

This is a list of successful candidates who have confirmed they wish to share their results as of 13 November 2023. This is not an exhaustive list of all successful candidates.