Exam entry form - Diploma in Financial Planning

Registration Fee:
The registration fee is a single payment for every candidate taking an exam. Once the fee is paid in respect of a named candidate there is no repeat of this fee required, no matter how many times a candidate takes CISI exams, including other CISI qualifications.

The Registration Fee includes CISI student membership.£58

INSTRUCTIONS:
Please tick the items required in the boxes provided. Please fill out your personal details below. Payment can be made by payment card or by firm account.

Registration fee
1. Financial Planning & Advice
   £291
   £87
   £388
   AM/PM

2. Case Study Material and eLearning
   £100
   Case Study Assessment Fee
   £156
   Case Study Options – please select one
   Retirement Planning
   Estate Planning

Eligibility*
Candidates sitting these exams must have one of the following:
1. RDR-compliant qualification (with gap-fill if necessary)
2. A current and valid SPS

* Please ensure you send evidence of your eligibility if you have not done this previously. This may be a copy (hard or soft) of your qualification certificate or current statement of professional standing.

Notes
Please note, it is our policy to publish the names of successful qualification achievers.
Please tick here if you do not wish your name to be published:  
Please tick here if you do not wish to receive marketing from the CISI:

You should email your completed booking form to fpexams@cisi.org

PERSONAL DETAILS: Please print in capitals
Surname: (Note 6)  
Forename(s):  
Home address:  
Home telephone:  
Mobile:  
Postcode:  
Date of birth:  

CANDIDATE NUMBER: (Note 3)
Title:  

ASSESSMENT FEES: (Note 4)
Employer-sponsored

or self-sponsored

EMPLOYMENT DETAILS: Please use Company Stamp if possible
Name of firm:  
Firm’s address:  
Position held:  
Office telephone:  
Email address:  
Postcode:  

Please indicate with a tick where you would like correspondence to be sent:  
Home
Work
Email

Please photocopy this form to book for more than one candidate. Alternatively visit the CISI website to book online or download a form.
1. **STUDENT MEMBERSHIP:** For details of the benefits of student membership please visit cisi.org/mgrade

2. **COMPUTER BASED TESTING EXAMINATIONS (CBT):** The opening hours for UK venues only are available on the CISI website. Please note dates cannot be guaranteed as bookings are subject to availability. Early booking is advised. For a full list of CBT venues please consult the CISI website: cisi.org/cbtmaps.

3. **CANDIDATE NUMBER:** If you have previously taken CISI exams, please insert your candidate number. Otherwise, leave blank.

4. **EXAM FEES:** VAT is not applicable. If this form is more than 12 months old (see issue date on front, in bottom left hand corner), it is advisable to telephone or consult the website to check that the fees are current. Payment can be made by American Express, Delta, Eurocard, MasterCard, Visa Debit and Visa. Please complete the details below.

5. **CHANGE OF ADDRESS:** Please notify of any address change promptly.

6. **CHANGE OF NAME:** If you have changed your name since your last exam please send us a copy of the relevant documentation, eg, marriage certificate, marked for the attention of the Data Integrity Executive. Failure to submit the relevant documentation may result in refusal of entry to an exam or incorrect exam certificate being provided.

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**PAYMENT:** Please fill out the appropriate information

| Account Firms: | Please invoice. | Invoice recipient name: _______________________________________________ | Job title: _______________________________________________
|----------------|----------------|-------------------------------------------------|

**Payment by cheque:** Cheques should be made payable to ‘Chartered Institute for Securities & Investment’ and crossed ‘Account Payee only’.  

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**Declaration:**

The Institute reserves the right to publish exam results.

Candidate’s signature: ____________________________________________ Date: ___________________________

Unsigned forms and forms signed on behalf of candidates are NOT accepted.

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Please send/fax both pages of this form to:
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Telephone: +44 20 7645 0777  Facsimile: +44 20 7645 0601  Email: customersupport@cisi.org
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