



Hoare Nairne Scholarship 2017-18

Shamaila Shah, Education Development Manager and Simon Culhane Chartered FCSI, CEO at the CISI with Shih Yen*, winner of the Hoare Nairne Scholarship 2016-17

The Hoare Nairne Scholarship is awarded by the CISI Educational Trust and is open to one UK resident per year to support the successful candidate to study towards the CISI's premier qualification, the **Chartered Wealth Manager Qualification**. The qualification is comprised of three units: Financial Markets, Portfolio Construction Theory and Applied Wealth Management.

The winner will receive £2,500 towards the costs of tuition and exam entry fees for the qualification.

To be considered for the scholarship, candidates must:

1. Hold an appropriate benchmark qualification

Qualifications acceptable for entry to the Chartered Wealth Manager Qualification:

- Investment Advice Diploma (IAD) or any other RDR compliant qualification, including a qualification that is RDR compliant with gap fill (even if the gap fill is not actually carried out)
- Any CISI Level 3 benchmark qualification, such as the CISI's Capital Markets Programme
- International Certificate in Advanced Wealth Management
- IMC Level 4 (without the need for CFA1)
- UK full accountancy and actuarial qualifications*
- MBAs/MScs in financial disciplines which have a strong investment related element that the CISI deems relevant
- CFA
- CEFA
- Overseas qualifications where these are recognised by the FCA, eg FINRA, SAAJ, JSDA
- EFPA (European Financial Planning Association)
- Overseas qualifications where the applicant can demonstrate that the number of study hours, the form of assessment and the content (which should have a strong investment related element) are appropriate to prepare them for study at Masters level
- Any financial services related qualification (not unit) at Levels 5-7 (eg. the CISI Diploma)

2. Submit a 1,500 word essay answering the following question:

“From the customers perspective what are the advantages and disadvantages between using a Robo-advisor and a human-advisor”

3. Submit a supporting statement

You must also submit a 400 word supporting statement on why you should be awarded the scholarship.

To apply:

Email MastersScholarship@cisi.org

Closing date:

Tuesday 2 May 2017 (including submission of essay)

* Shih Yen works within the Financial Advice & Investment Solutions team at Coutts & Co. She completed her first exam leading to the Chartered Wealth Manager Qualification in December 2016. The scholarship is benefitting her studies towards achieving CWM: “It has helped me professionally – from the knowledge gained through undertaking the Chartered Wealth Manager qualification, to increasing my network and raising my profile within Coutts & Co.”