

Level 7 Financial Plan Case Study

Assessment Submission Form



Please submit this form with your Financial Plan for assessment to FPsubmissions@cisi.org

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 state which tax year you are using on the front of your plan.

Enclosure checklist

- Plan must be a maximum of 60 pages including appendices
- Plan must use Arial font size 10 and 1.5 paragraph line spacing
- Candidate number included on the front cover
- Plan submitted as a word or PDF document and use the correct naming convention "candidate number_Submission 1/2/3" for 1st/2nd/3rd submission
- Plan checked against Assessment Criteria

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

Second and Third Submissions

- Payment made for re-submission

Plagiarism statement

Candidates should be aware that the CISI uses software to produce an originality report for each Financial Plan. This is to ensure candidates are producing their own work and are not plagiarising from other sources (including the Example Plan). Plans found to have significant reproductions of text will be returned to candidates unmarked. Candidates will be given 10 days to reply to the CISI on any issues of plagiarism and they may also be subject to other penalties or sanctions.

- 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