



Chartered
Insurance
Institute

2018 qualifications:
Your guide to studying with us

Knowledge not novice

Standards. Professionalism. Trust.

About us

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and financial planning professions. Our 125,000 members commit to high professional standards and continuing professional development.

We work with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Success in CII qualifications is universally recognised as evidence of knowledge and technical expertise.

Our members are able to drive personal development and maintain their professional standing by adhering to our Code of Ethics and by accessing a range of learning services.

Find out more at: cii.co.uk

Our vision

Our vision is to build public trust across the insurance and financial planning professions by providing relevant learning, insightful leadership and an engaged membership. Driving professional standards is at the heart of everything we do. Ethical conduct and technical competence are supported by our Code of Ethics and qualifications, designed in conjunction with industry practitioners and registered with Ofqual in the Regulated Qualifications Framework.

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Your journey our commitment

We are here to support you and your career development, whether you are a new entrant to the sector or a professional looking to keep ahead of the curve.

Become a member

Membership supports your professional development and enhances your career potential.

As a member you enjoy access to technical and market knowledge along with practical support for your continuing professional development (CPD). You become integrated into a huge network of like-minded professionals.

Find out more on pages 6–9.

Get recognition for your other qualifications

If you hold a degree or professional qualification in a relevant subject, for example: accounting, business or law; you could receive credits that count towards completion of a CII qualification. In doing so, you could avoid duplication of learning and obtain your qualification more quickly.

Find out more on page 10–11.

Create a personalised learning programme

The flexibility of our qualifications framework allows you to select units according to the requirements of your current role or future career aspirations. We have identified learning pathways across sector disciplines to help guide you through the framework. We use a range of assessment methods, all carefully chosen and designed to promote the optimum type of learning for each level and qualification.

Find out more on pages 10–35 and pages 36–59.

Earn the mark of professionalism

Once qualified, members are entitled to use the accompanying designation. In order to ensure this expertise remains current, use of designations is dependent on ongoing membership and CPD requirements.

Advanced Diploma holders can apply for Chartered or Fellowship status.

Find out more on pages 65–67.



A community of like-minded professionals

Becoming a member

Join a community of professionals committed to driving the profession forward through their technical expertise, ethical behaviour and a culture of learning and development.

Connect through our extensive member network and benefit from shared technical knowledge, practitioner insights and relationships with your local professional peers.

Becoming a member is simple. As long as you work within or are connected to the insurance or financial planning professions, you are invited to join our growing community.

Membership types, annual fees and registration details can be found online.

cii.co.uk/join



Professionalism begins with qualifications.

Membership demonstrates your ongoing commitment.

Professional body membership aligns you with the highest standards and demonstrates your ongoing commitment to professional development. As part of a community of like-minded professionals you will continue to develop through sharing of knowledge and good practice.

Standards

Be part of a professional body that's recognised and respected by employers, regulators and your professional peers.

The Chartered Insurance Institute plays a pivotal role, setting standards for competence and influencing the future direction of the profession.

Professionalism

As the leading professional body, our members are highly respected and recognised for their knowledge and expertise.

Membership supports your professional development, enhances your career potential and integrates you into a network of like-minded professionals.

Trust

Public trust is at the heart of all that we do. Our Royal Charter ensures that we never lose sight of this mission.

We help to unite the profession, increasing the credibility of the sector with government, policy-makers, regulators and consumers.

Together, we drive confidence in the power of professional standards.

Designations

Promote your expertise with pride using internationally recognised designations upon completion of qualifications.

Demonstrate your level of knowledge with employers, clients and professional peers, ensuring that your commitment to professional development is clear for all to see.

Designations may only be used by members.

cii.co.uk/designations

Continuing Professional Development (CPD)

We believe that learning and professional growth should never stop. That's why our qualified members commit to ongoing learning and development, helping to ensure that their knowledge remains up-to-date and relevant.

We have created a programme of events, in addition to a wealth of online resources to make sure that professional development is at the forefront of your membership.

cii.co.uk/cpd

Ethical culture

By committing to our Code of Ethics, you help to build consumer trust and ensure that high standards of professionalism are maintained. Complying with the Code through integrity and fair dealing increases the credibility of the profession with the government, policymakers and the public.

cii.co.uk/code

Insight and good practice guidance

Members get online access to news, research and a range of technical resources to provide insight into the markets in which they operate.

cii.co.uk/knowledge

Member discounts

Members enjoy significant discounts (typically over 20%) across a range of learning and development services including examinations, study materials and accreditation of prior learning.

You can also claim tax relief from your membership.

cii.co.uk/membership

Recognition not repetition



Recognition of prior learning

Before studying with us, check whether any of your previous qualifications from other professional bodies and institutes, including universities, count towards completion of a CII qualification. It could save you repeating learning and reduce your qualification costs.

To quickly find out whether you're eligible, visit cii.co.uk/prior-learning

Relevant degrees

If you hold a relevant degree in accounting, business, economics, finance, maths, management, insurance, risk management, statistics, actuarial, investment analysis or financial services you could receive credits that can be used towards completion of CII qualifications.

Professional qualifications

Often candidates who have studied with other professional bodies claim CII credits via our recognition of prior learning scheme. As an example, a claims practitioner who studied with the Chartered Institute of Loss Adjusters (CILA) could claim prior learning credits for:

- Level 3 Certificate in Insurance Claims Handling, providing 15 Certificate credits within the CII insurance qualifications framework
- Advanced Diploma, providing 60 Advanced Diploma credits within the CII insurance qualifications framework.

There are many qualifications which are recognised in this way. Visit the website for further details.

How to apply for CII credits

Once you've checked your eligibility and found that your qualification is recognised as prior learning, you will need to complete an application form with supporting evidence and send to our Customer Service team. They will review and confirm your eligibility by email.

If your application is successful, a fee per CII credit is payable before the prior learning is awarded. We will advise the correct fee based on the number of credits and your membership status.

Progress at your own pace

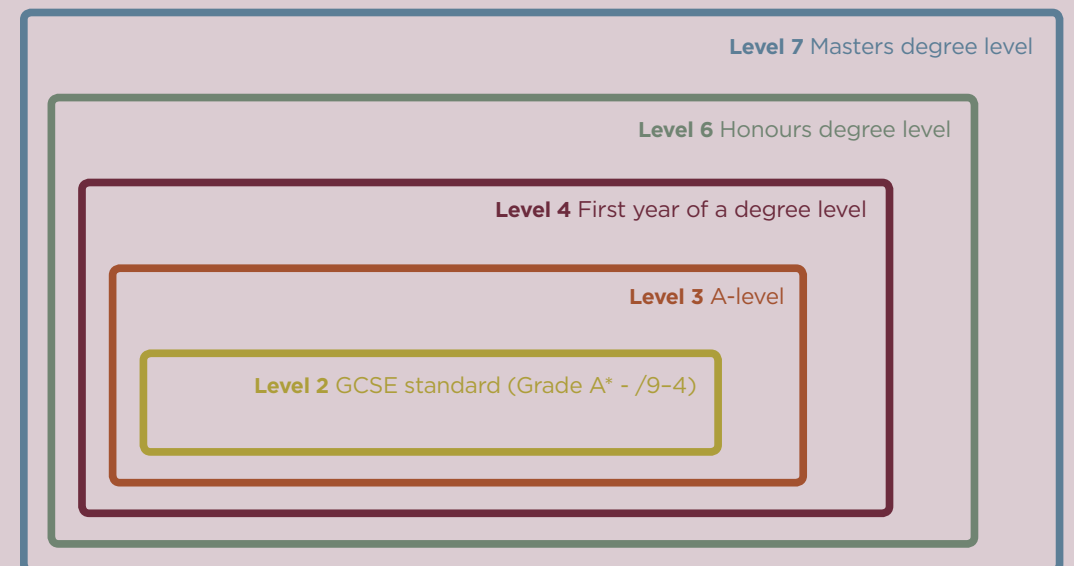


Studying with us

Quality assured learning

Our qualifications are designed in conjunction with experienced industry practitioners and are registered with Ofqual in the Regulated Qualifications Framework (RQF). This means all CII qualifications are quality assured and are supported by relevant learning outcomes, providing you with the required knowledge and skill-set to successfully apply learning upon completion.

Our qualifications rise in difficulty, from Level 2 Awards to Level 6 Advanced Diplomas. They meet the same standards as the UK education framework illustrated below.



Flexibility to suit your own needs

The qualifications are flexible, meaning you can create your learning pathway to suit your needs - whether you're looking to apply learning to your existing role or towards career aspirations.

Most of our qualifications have core units which are intended to provide you with the essential foundations to build upon.

In addition to these, you can choose units within the respective qualifications framework, regardless of unit level, to gain the credits to complete your qualification.

Qualification units range in difficulty across each framework and are assessed by either multiple choice question exam, written exam, mixed assessment, coursework assignment or dissertation.

Tailoring your perfect pathway

A woman with glasses, wearing a white long-sleeved shirt, is pointing her right hand towards a whiteboard. Her left hand is also raised, holding a pen. The background is a bright, slightly blurred whiteboard with some faint markings.

Qualifications

Supporting you all the way

With our qualifications, you can map out a learning pathway to fit your current role and responsibilities as well as your career aspirations.

We've listed common unit combinations in the qualification overviews to follow, pages 16–35 and 36–59, illustrating learning pathways from key market segments.

The learning pathways assume that you hold the preceding qualification and credits within the respective framework. These credits count towards completion of higher level qualifications.

For example, the Advanced Diploma is shown assuming you already hold the Diploma, with 210 credits that can be used towards the Advanced Diploma's 290 credit threshold.

Your Learning Statement

For pathway guidance, your personalised Learning Statement provides a record of the units and credits you currently hold and how these can be used towards further qualifications.

Request your Learning Statement online:
cii.co.uk/learningstatement

Note: you must have an online user profile and registered email address to access your CII Learning Statement. Registration is simple and free.

Insurance qualifications

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This is the framework for our insurance qualifications, detailing all units by level of difficulty, from Award through to Advanced Diploma.

Insurance qualifications framework

Award Level 2	Certificate Level 3	Diploma Level 4	Advanced Diploma Level 6	Level 7	Study and assessment	
<p>(FIT) Foundation Insurance Test 6 credits 40 study hours</p> <p>Non RQF The following units are not registered as part of the UK's Regulation Qualification Framework (RQF).</p> <p>(AWB) Award in Bancassurance¹ 15 credits 60 study hours</p> <p>(W01) Award in General Insurance^{1, 3} 15 credits 50 study hours</p> <p>(WH1) Award in General Insurance (Hong Kong)² 15 credits 50 study hours</p> <p>(W04) Award in Customer Service in Insurance¹ 15 credits 50 study hours</p>	<p>(IF1) Insurance, legal and regulatory 15 credits 60 study hours</p> <p>(IF2) General insurance business 15 credits 60 study hours</p> <p>(IF3) Insurance underwriting process 15 credits 60 study hours</p> <p>(IF4) Insurance claims handling process 15 credits 60 study hours</p> <p>(IF5) Motor insurance products 15 credits 60 study hours</p> <p>(IF6) Household insurance products 15 credits 60 study hours</p> <p>(IF7) Healthcare insurance products 15 credits 60 study hours</p> <p>(IF8) Packaged commercial insurances 15 credits 60 study hours</p> <p>(IF9) Customer service in insurance 15 credits 60 study hours</p> <p>(I10) Insurance broking fundamentals 15 credits 60 study hours</p> <p>(I11) Introduction to risk management 15 credits 60 study hours</p> <p>(LM1) London market insurance essentials 10 credits 40 study hours</p> <p>(LM2) London market insurance principles and practices 15 credits 60 study hours</p> <p>(LM3) London market underwriting principles 15 credits 60 study hours</p>	<p>(M05) Insurance law 25 credits 120 study hours</p> <p>(M21) Commercial insurance contract wording 20 credits 100 study hours</p> <p>(M80) Underwriting practice 20 credits 80 study hours</p> <p>(M81) Insurance broking practice 20 credits 80 study hours</p> <p>(M85) Claims practice 20 credits 80 study hours</p> <p>(M92) Insurance business and finance 25 credits, 100 study hours</p> <p>(M93) Commercial property & business interruption insurances 25 credits 100 study hours</p> <p>(M94) Motor insurance 25 credits 100 study hours</p> <p>(M96) Liability insurances 25 credits 100 study hours</p> <p>(M97) Reinsurance 30 credits 120 study hours</p> <p>(P66/M66) Delegated authority³ 25 credits 100 study hours</p>	<p>(P67/M67) Fundamentals of risk management⁴ 25 credits 100 study hours</p> <p>(P86/M86) Personal insurances⁴ 20 credits 80 study hours</p> <p>(P90/M90) Cargo and goods in transit insurances⁴ 25 credits 100 study hours</p> <p>(P91/M91) Aviation and space insurance⁴ 30 credits 120 study hours</p> <p>(P98/M98) Marine hull and associated liabilities⁴ 30 credits 100 study hours</p> <p>(P61) Life, critical illness and disability underwriting 30 credits 80 study hours</p> <p>(P62) Life, critical illness and disability claims 30 credits 120 study hours</p> <p>(P63) Long term insurance business 25 credits 100 study hours</p> <p>(P64) Private medical insurance practice 25 credits 100 study hours</p>	<p>(530) Economics and business 30 credits 150 study hours</p> <p>(820) Advanced claims 30 credits 150 study hours</p> <p>(930) Advanced insurance broking 30 credits 150 study hours</p> <p>(945) Marketing insurance products and services 30 credits 150 study hours</p> <p>(960) Advanced underwriting 30 credits 150 study hours</p> <p>(990) Insurance corporate management 30 credits 150 study hours</p> <p>(992) Risk management in insurance 30 credits 150 study hours</p> <p>(995) Strategic underwriting 30 credits 150 study hours</p> <p>(996) Strategic claims management 30 credits, 150 study hours</p> <p>(997) Advanced risk financing and transfer 30 credits 150 study hours</p> <p>(590) Principles of Takaful⁵ 30 credits 120 study hours</p>	<p>(993) Advances in strategic risk management in insurance 50 credits 180 study hours</p> <p>(991) London market specialisation 50 credits 180 study hours</p> <p>(994) Insurance market specialisation 50 credits 180 study hours</p>	<p>Each unit covers an individually assessed topic. Assessment methods vary based on a unit's level and subject matter.</p> <p>Multiple choice question (MCQ) exam Study is based on a specified enrolment period, from 01 January – 31 December. MCQ exams are available weekly at UK and selected international online exam centres, or twice-yearly in April and October at international paper-based exam centres.</p> <p>Written exam Study is based on a 12 month enrolment period from the date of purchase. Written exams are held twice-yearly in April and October at UK and international exam centres.</p> <p>Mixed assessment Study is based on an 18 month enrolment period from the date of purchase. A combination of a single coursework assignment must be passed within the first six months and a MCQ exam passed within 18 months.</p> <p>Coursework assignments Study is based on a 12 month enrolment period from the date of purchase. Three written assignments, each typically between 2,000–3,000 words, must be passed.</p> <p>Dissertation Study is based on an 18 month enrolment period from the date of purchase. A dissertation, typically between 10,000–11,000 words, on an agreed subject must be submitted.</p>
<p>Notes</p> <ol style="list-style-type: none"> 1. Available to international candidates only 2. Available to candidates in Hong Kong only 3. Unit W01 is also available in Arabic, (W02) Award in general insurance; and in simplified Chinese, (WM1) Award in general insurance 4. Mixed assessment will replace traditional written exams for these units. For details, visit cii.co.uk/framework-enhancements 5. Unit 590 is also available in Arabic, (595) Principles of Takaful 						

We recognise that with such a flexible framework, there are many options available. To help, we detail underwriting, broking and claims case studies, represented by typical job roles and levels of seniority.

Insurance qualifications case studies



Underwriting

Josie, a property underwriting assistant

Josie works for a Lloyd's syndicate as a property underwriting assistant and wants to be a property underwriter. To achieve this, she studies the Advanced Diploma in Insurance.

Josie holds a mixture of Certificate, Diploma and Advanced Diploma level units including:

- (LM1) London market insurance essentials 10 credits
- (LM2) London market insurance principles and practices 15 credits
- (M05) Insurance law 25 credits
- (M92) Insurance business and finance 25 credits
- (M93) Commercial property and business interruption insurances 25 credits
- (960) Advanced underwriting 30 credits

In order to meet the qualification requirements, Josie undertakes additional Diploma and Advanced Diploma level units:

- (530) Economics and business 30 credits
- (820) Advanced claims 30 credits
- (990) Insurance corporate management 30 credits
- (992) Risk management in insurance 30 credits
- (M21) Commercial insurance contract wording 20 credits
- (M97) Reinsurance 30 credits

Successfully passing these, Josie meets the 290 credit threshold and is awarded the Advanced Diploma in Insurance. As a member, she is entitled to use the designation ACII and can apply for Chartered Insurer status should she wish. She also has the option to continue her studies towards Fellowship.



Broking

Chris, an account manager at a commercial brokerage

Wanting to develop his technical knowledge of the insurance business, particularly from a broking perspective, Chris decides on the Diploma in Insurance.

Chris takes the core Diploma in Insurance units:

- (M05) Insurance law 25 credits
- (M92) Insurance business and finance 25 credits

He then chooses additional Diploma level units that meet the needs of his broking role and career aspirations:

- (M81) Insurance broking practice 20 credits
- (M93) Commercial property and business interruption insurances 25 credits
- (M96) Liability insurances 25 credits

Successfully passing these, Chris meets the 120 credit threshold and is awarded the Diploma in Insurance. As a member, he is entitled to use the designation Dip CII. He can continue his studies to the Advanced Diploma in Insurance.



Claims

Leila, a motor claims handler

Working for a personal lines insurer, Leila is keen to develop her knowledge of claims handling and decides to undertake the Certificate in Insurance.

With some market knowledge, Leila holds the Award for the Foundation Insurance Test:

- (FIT) Foundation Insurance Test 6 credits

To meet the completion requirements, Leila undertakes the core unit and chooses two additional Certificate level units:

- (IF1) Insurance, legal and regulatory 15 credits
- (IF4) Insurance claims handling process 15 credits
- (IF5) Motor insurance products 15 credits

Successfully passing these, Leila meets the 40 credit threshold and is awarded the Certificate in Insurance. As a member, she is entitled to use the designation Cert CII. She can continue her studies to the Diploma in Insurance.

Award for the Foundation Insurance Test

RQF level:

2

CII credits:

6

Member designation:

N/A

Recommended study time:

40 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£125

Non-member:

£160

Overview

The Level 2 Award develops an understanding of key insurance topics: how the insurance market operates, fundamental risk and insurance principles and procedures, and core personal and commercial insurance products.

The Award is particularly suitable if you are new to the sector or if you are in an associated industry, or a support role where you need to demonstrate a basic understanding of general insurance.

Completion requirements

The Award comprises one core unit which provides a total of 6 credits on successful completion.

(FIT) Foundation Insurance Test
6 credits

Core

Assessment method

Two hour exam comprising 100 multiple choice questions (MCQs). For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/FIT

Award in London Market Insurance

Overview

A specialist qualification for those working in or with the London Market. The Level 3 Award provides a broad understanding of insurance process and practice across the London Market as well as detailed understanding of technical topics.

Completion requirements

The Award comprises two core units which provide a total of 25 credits on successful completion.

(LM1) London Market insurance essentials 10 credits	(LM2) London Market insurance principles and practices 15 credits
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Core

Assessment method

Both units are assessed by multiple choice question exam (MCQ). For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

LM1	One hour exam, comprising 50 MCQs
LM2	Two hour exam, comprising 55 MCQs and 4 case studies, each comprising 5 MCQs

More details and to enrol:
cii.co.uk/ALMI

RQF level:

3

CII credits:

25

Member designation:

N/A

Recommended study time:

40-60 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£215

per unit

Non-member:

£290

per unit

Award in General Insurance International only

RQF level:
N/A

CII credits:
15

Member
designation:
CII (Award)

Recommended
study time:
50 hrs

Study package:
• Study text – print
and ebook
• Assessment entry
• Online support
including
exam guide via
RevisionMate

Member:
£90

Non-member:
£100

Overview

The Award in General Insurance is an introductory-level qualification that helps develop your understanding of insurance principles, procedures and products.

It's particularly suitable for non-UK insurance practitioners at the beginning of their career or seeking to build on existing knowledge through formal study. It also meets the operating standards as set by the local regulator.

Also available in Arabic and Mandarin.

Completion requirements

The Award comprises one core unit which provides a total of 15 credits on successful completion.

(W01) Award in
General Insurance
15 credits

Core

Assessment method

Two hour exam comprising 100 multiple choice questions (MCQs). Results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-general-insurance

Award in General Insurance Hong Kong only

RQF level:
N/A

CII credits:
15

Member
designation:
CII (Award)

Recommended
study time:
50 hrs

Study package:
• Study text – print
and ebook
• Assessment entry
• Online support
including
exam guide via
RevisionMate

Member:
£90

Non-member:
£100

Overview

Similar to the international Award in General Insurance, but specific to the Hong Kong regulatory environment, the Award builds knowledge and understanding of insurance principles, local procedures and products.

It is suitable for new entrants, or those wishing to build on existing knowledge through formal study. It also meets the minimum operating standards set by the Hong Kong regulator.

Completion requirements

The Award comprises one core unit which provides a total of 15 credits on successful completion.

(W01) Award in
General Insurance
(Hong Kong)
15 credits

Core

Assessment method

Two hour online exam comprising 100 multiple choice questions (MCQs). Result notification is immediate on completion.

More details and to enrol:
[cii.co.uk/award-general-insurance\(hong-kong\)](http://cii.co.uk/award-general-insurance(hong-kong)).

Award in Customer Service in Insurance

International only

RQF level:
N/A

CII credits:
15

Member designation:
CII (Award)

Recommended study time:
50 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:
£90

Non-member:
£100

Overview

The international Award in Customer Service in Insurance provides an essential introduction to the customer service function specific to insurance companies, intermediaries and providers. It helps build knowledge and understanding of the key processes and requirements which deliver valued customer service.

Designed for those working in non-UK customer-facing roles, the Award is also suitable for sales support and claims settlement staff, as well as new industry entrants.

Completion requirements

The Award comprises one core unit which provides a total of 15 credits on successful completion.

(W04) Award in Customer Service in Insurance
15 credits

Core

Assessment method

90 minutes paper exam comprising 50 multiple choice questions (MCQs). Results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-customer-service

Certificate in Insurance and Financial Services

International only

RQF level:
N/A

CII credits:
40-45

Member designation:
Cert CII

Recommended study time:
50 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:
£90
per unit

Non-member:
£100
per unit

Overview

For candidates outside the UK who provide financial advice and also act as insurance agents, or aspire to, we offer a dedicated study pathway to achieve the Certificate in Insurance and Financial Services.

In successfully completing three units you will gain a solid base of knowledge relevant to your role and qualify for the Certificate.

Completion requirements

The Certificate comprises three Award units from a choice of six and provides a total of 40-45 credits on successful completion.



Option units

Assessment method

Award level units are assessed by paper multiple choice question exam (MCQ), with results released five weeks following the exam sitting.

W01, WH1	Two hour exam, comprising 100 MCQs
W04	90 minutes exam, comprising 50 MCQs
AWP	One hour exam, comprising 50 MCQs which include two case studies, comprising four MCQs
AWB, AWF	Two hour exam, comprising 75 MCQs

More details and to enrol:
cii.co.uk/cert-ins-fs

Certificate in London Market Insurance

RQF level:
3

CII credits:
40

Member designation:
Cert CII (London Market)

Recommended study time:
40-60 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:
£215
per unit

Non-member:
£290
per unit

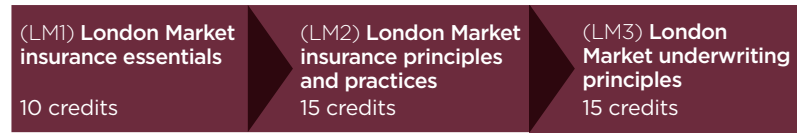
Overview

Building on introductory knowledge gained from the Award in London Market Insurance, the Level 3 Certificate in London Market Insurance includes one further unit (LM3) London market underwriting principles.

The Certificate develops knowledge and understanding of the underwriting disciplines within the London Market, key elements of the cycle, and explores the opportunities and challenges posed by using different distribution channels such as delegated underwriting.

Completion requirements

The Certificate comprises three core units which provide a total of 40 credits on successful completion.



Core

Assessment method

Certificate level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

LM1 One hour exam, comprising 50 MCQs

LM2 Two hour exam, comprising 55 MCQs and 4 case studies, each comprising 5 MCQs

LM3 Two hour exam, comprising 75 MCQs

More details and to enrol:
cii.co.uk/cert-insurance

Certificate in Insurance

RQF level:
3

CII credits:
40

Member designation:
Cert CII

Recommended study time:
40-60 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:
£215
per unit

Non-member:
£290
per unit

More details and to enrol:
cii.co.uk/cert-insurance

Overview

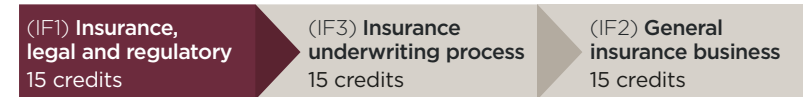
The Level 3 Certificate in Insurance is a core qualification for insurance staff working across all sectors of the profession and provides candidates with a fundamental grounding in key insurance principles, disciplines, products and markets.

The Certificate develops the knowledge and confidence needed before you begin to focus your subsequent studies and specialise according to your ambitions and career requirements.

Completion requirements

The Certificate comprises one core unit and two option units from the CII insurance qualifications framework, providing a total of 40 credits on successful completion.

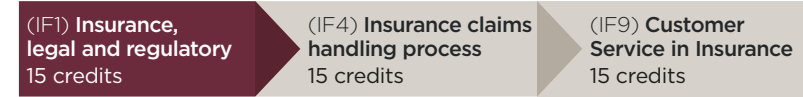
A popular underwriting pathway includes the unit combination:



And a popular broking pathway may resemble:



Whilst a popular claims pathway involves:



Core

Option units

Assessment method

Certificate-level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

IF1, IF2, IF7, W01 Two hour exam, comprising 100 MCQs

IF3, IF4, IF8, I11 Two hour exam, comprising 75 MCQs

IF5, IF6 Two hour exam, comprising 50 MCQs and five case studies, each comprising five MCQs

IF9 90 minute exam comprising 50 MCQs written to ten case studies.

I10 Two hour exam comprising 65 MCQs and two case studies, each comprising 5 MCQs

LM1 One hour exam, comprising 50 MCQs

LM2 Two hour exam, comprising 55 MCQs and 4 case studies, each comprising 5 MCQs

Diploma in Insurance

RQF level:
4

CII credits:
120

Member designation:
Dip CII

Recommended study time:
80-120 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:
£265
per unit

Non-member:
£340
per unit

Overview

The Level 4 Diploma in Insurance is a technical and supervisory qualification for insurance staff of any discipline. The Diploma will provide you with a firm understanding of insurance fundamentals and will develop advanced technical knowledge.

Completion requirements

On the assumption you already hold the Certificate in Insurance and respective 40 credits, the Diploma comprises two core units and option units from across the CII Insurance qualifications framework, providing a total of 120 credits on completion.

Core units include:



Core

Assessment method

Diploma level units are assessed by written exam or mixed assessment. For written exams in April and October, results notification is on designated dates, normally 6-8 weeks following the exam sitting. For mixed assessment, results notification is 40 working days following your coursework submission.

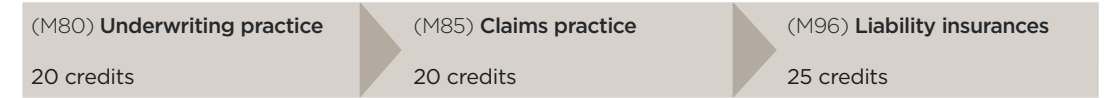
P61, P62, P63, P64, P66, P67, P86, P90, P91, P98	Three hour written exam, comprising 14 compulsory short answer questions and 2 case studies/essay questions
M05, M21, M66, M67, M80, M81, M85, M86, M90, M91, M93, M94, M96, M97, M98	Coursework assignment with 10 compulsory scenario-based questions, and a one hour online exam comprising 50 multiple choice questions
M92	Coursework assignment with 10 compulsory scenario-based questions, a 90 minute online exam comprising 25 multiple choice questions (MCQs) and five case studies, each comprising five MCQs

More details and to enrol:
cii.co.uk/dip-insurance

A popular underwriting pathway includes the unit combination:



Core

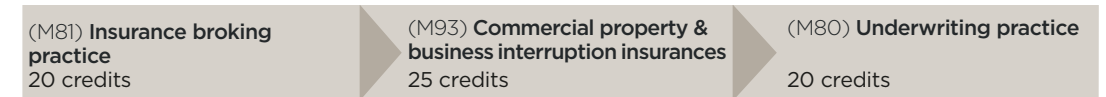


Option units

And a popular broking pathway may resemble:



Core

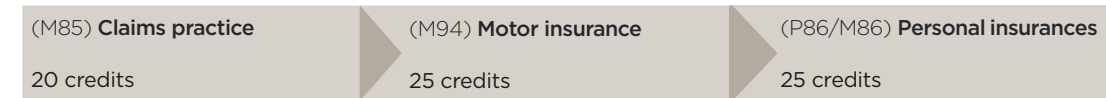


Option units

Whilst a popular claims pathway involves:



Core



Option units

Certificate in London Market Insurance Specialisation

RQF level:

7

CII credits:

50

Member designation:

N/A

Recommended study time:

180 hrs

Study package:

- Tutor advice

Member:

£1,155

Non-member:

£1,400

Overview

Developed in partnership with the Lloyd's Market Association (LMA), the Level 7 Certificate in London Market Insurance Specialisation develops practitioners' research skills within a concentrated field of study appropriate to the London Market.

Completion requirements

The Certificate comprises one core unit, assessed by dissertation on an agreed topic, and provides a total of 50 credits on successful completion.

(991) London market insurance specialisation
50 credits

Core

Assessment method

One 10,000-11,000 word dissertation. Results take the form of a pass, fail or distinction and are released within 50 working days of the submission deadline date.

More details and to enrol:
cii.co.uk/lm-specialisation

Certificate in Insurance Market Specialisation

Overview

Similar in structure to the Certificate in London Market Specialisation, the Certificate in Insurance Market Specialisation has been developed for the broader insurance community. It is ideal for insurance market practitioners who wish to develop their research skills and apply them to a specific subject area.

Completion requirements

The Certificate comprises one core unit, assessed by dissertation on an agreed topic, and provides a total of 50 credits on successful completion.

(994) Insurance market specialisation
50 credits

Core

Assessment method

One 10,000-11,000 word dissertation. Results take the form of a pass, fail or distinction and are released within 50 working days of the submission deadline date.

More details and to enrol:
cii.co.uk/lm-specialisation

RQF level:

7

CII credits:

50

Member designation:

N/A

Recommended study time:

180 hrs

Study package:

- Tutor advice

Member:

£1,155

Non-member:

£1,400

Advanced Diploma in Insurance

RQF level:

6

CII credits:

290

Member designation:

ACII

Recommended study time:

120-180 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate (exam guide only available for units M05 and M92)

Starting at:

Member:

£415

per unit

Non-member:

£510

per unit

More details and to enrol:
cii.co.uk/adip-insurance

Overview

The Level 6 Advanced Diploma in Insurance provides enhanced understanding of insurance practice and is a comprehensive assessment of market knowledge and understanding. Widely recognised, it is evidence of your commitment and ability and can be your passport to a successful career. Holders of the Advanced Diploma can apply for Chartered status or progress to Fellowship.

Completion requirements

On the assumption you already hold the Diploma in Insurance and respective 120 credits, the Advanced Diploma comprises three core units and option units from the CII Insurance qualifications framework, providing a total of 290 credits on successful completion.

Core units include:



Core

Assessment method

Diploma and Advanced Diploma level units are assessed by written exam or mixed assessment.

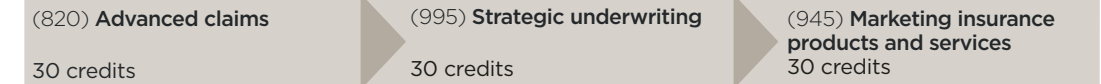
For written exams in April and October, results notification is on designated dates, normally 6-8 weeks following the exam sitting. For coursework assessment or dissertation, results notification is 40 days following your submission.

M05	Coursework assignment with 10 compulsory scenario-based questions, a one hour online exam comprising 50 multiple choice questions
M92	Coursework assignment with 10 compulsory scenario-based questions, a 90 minute online exam comprising 25 multiple choice questions (MCQs) and five case studies, each comprising five MCQs
590	Three hour written exam, comprising eight short answer questions, one case study question and three essay questions from a choice of five
530, 820, 930, 945, 960, 990, 992, 996, 997	Three coursework assignments of up to 3,200 words
991, 994	One 10,000-11,000 word dissertation
993	Three 4,000 word coursework assignments

A popular underwriting pathway includes the unit combination:



Core

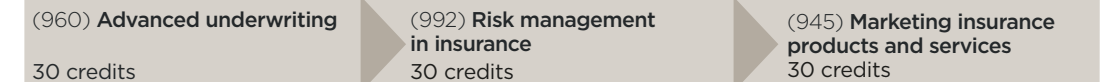


Option units

And a popular broking pathway may resemble:



Core

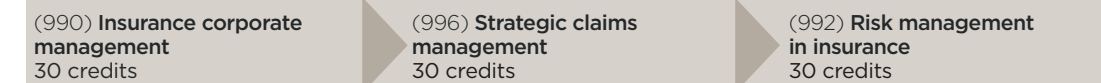


Option units

Whilst a popular claims pathway involves:



Core



Option units

Personal Finance qualifications

- 38. Personal Finance qualifications framework
- 40. Personal Finance learning pathways

Financial Planning:

- 44. Award in Financial Planning
(International only)
- 45. Award in Bancassurance
(International only)
- 46. Award in Long Term Care Insurance
- 47. Award in Pensions Update
- 48. Certificate in Insurance and Financial Services
(International only)
- 49. Certificate in Paraplanning
- 50. Certificate in Pension Transfer Advice
- 51. Diploma in Regulated Financial Planning
- 52. Diploma in Financial Planning
- 54. Advanced Diploma in Financial Planning

Investments and securities:

- 56. Award in Investment Planning
(International only)
- 57. Certificate in Investment Operations
- 58. Certificate in Securities Advice and Dealing
- 59. Certificate in Discretionary Investment Management

Life and pensions:

- 60. Award in Life and Pensions Foundations
- 61. Award in Financial Administration
- 62. Certificate in Financial Services
- 64. Certificate in Regulated Financial Services Operations

Mortgages and equity release:

- 65. Certificate in Mortgage Advice
- 66. Certificate in Equity Release
- 67. Certificate in Advanced Mortgage Advice

This is the framework for our personal finance qualifications, detailing all units by level of difficulty, from Award through to Advanced Diploma.

Personal Finance qualifications framework

Award Level 2	Certificate Level 3	Diploma Level 4	Advanced Diploma Level 6	Study and assessment
<p>(LF1) Life and pensions foundations 0 credits 40 study hours</p> <p>Non RQF The following units are not registered as part of the UK's Regulation Qualification Framework (RQF).</p> <p>(AWB) Award in Bancassurance¹ 15 credits 60 study hours</p> <p>(AWF) Award in Financial Planning¹ 15 credits 60 study hours</p> <p>(AWI) Award in Financial Planning (India)² 15 credits 60 study hours</p> <p>(AWP) Award in Investment Planning¹ 10 credits 50 study hours</p>	<p>(CF1) UK financial services, regulation and ethics 15 credits 60 study hours</p> <p>(CF6) Mortgage advice 20 credits 100 study hours</p> <p>(CF8) Long term care insurance 15 credits 70 study hours</p> <p>(ER1) Equity release 15 credits 70 study hours</p> <p>(FA1) Life office administration 10 credits 60 study hours</p> <p>(FA2) Pensions administration 10 credits 60 study hours</p> <p>(FA4) Collective investment scheme administration 10 credits 70 study hours</p> <p>(FA5) Individual savings account administration 10 credits 70 study hours</p> <p>(FA6) Investment client servicing 10 credits 70 study hours</p> <p>(LP1) Life and pensions customer operations 15 credits 60 study hours</p> <p>(LP2) Financial services products and solutions 20 credits 100 study hours</p> <p>(LP3) Life and pensions principles and practices 10 credits 50 study hours</p> <p>(R05) Financial protection 10 credits 50 study hours</p> <p>Non RQF</p> <p>(GR1) Group risk 10 credits 50 study hours</p>	<p>(J02) Trusts 20 credits 100 study hours</p> <p>(J03) The tax and legal aspects of business 20 credits 100 study hours</p> <p>(J05) Pension income options 20 credits 100 study hours</p> <p>(J07) Supervision in a regulated environment 20 credits 100 study hours</p> <p>(J09) Paraplanning 30 credits 100 study hours</p> <p>(J10) Discretionary investment management 20 credits 80 study hours</p> <p>(J11) Wrap and platform services 20 credits 100 study hours</p> <p>(J12) Securities advice and dealing 20 credits 70 study hours</p> <p>(R01) Financial services, regulation and ethics 20 credits 60 study hours</p> <p>(R02) Investment principles and risk 20 credits 60 study hours</p> <p>(R03) Personal taxation 10 credits 50 study hours</p> <p>(R04) Pensions and retirement planning 10 credits 50 study hours</p> <p>(R06) Financial planning practice 30 credits 100 study hours</p> <p>(R07) Advanced mortgage advice 15 credits 70 study hours</p> <p>(R08) Pensions update³ 10 credits 50 study hours</p>	<p>(AF1) Personal tax and trust planning 30 credits 150 study hours</p> <p>(AF2) Business financial planning 30 credits 150 study hours</p> <p>(AF3) Pension planning⁴ 30 credits 150 study hours</p> <p>(AF4) Investment planning 30 credits 150 study hour</p> <p>(AF5) Financial planning process 30 credits 150 study hours</p> <p>(AF6) Senior management and supervision 30 credits 150 study hours</p> <p>(AF7) Pension transfers 20 credits 100 study hours</p> <p>(AF8) Retirement income planning 30 credits 150 study hours</p>	<p>Each unit covers an individually assessed topic. Assessment methods vary based on a unit's level and subject matter.</p> <p>Multiple choice question (MCQ) exam Study is based on a specified enrolment period, from 01 September - 31 August. MCQ exams are available weekly at UK and selected international online exam centres, or twice-yearly at international paper-based exam centres (April and October).</p> <p>Written exam Study is based on a 12 month enrolment period from the date of purchase. Written exams are held twice-yearly in April and October at UK and non-UK exam centres. The exception is unit R06 which is tested four times yearly in January, April, July and October.</p> <p>Coursework assignments Study is based on a 12 month enrolment period from the date of purchase. Three written assignments, each typically between 2,000-3,000 words, must be passed.</p>

Notes

1. Available to international candidates only
2. Available to candidates in India only
3. Unit R08 will be withdrawn in August 2018
4. Unit AF3 will be withdrawn following the April 2018 exam

We recognise that with such a flexible framework there are many options available. To help, we detail financial planning, investments and securities, life and pensions, and mortgages and equity release case studies, represented by typical job roles and levels of seniority.

Personal Finance qualifications case studies



Financial Planning

Mo, a sole-trader IFA

Mo holds the Diploma in Financial Planning and decides to complete the Advanced Diploma in Financial Planning in order to achieve Chartered Financial Planner status.

Units already held:

- | | |
|---|------------|
| • (R01) Financial services, regulation and ethics | 20 credits |
| • (LP1) Life and pensions customer operations | 15 credits |
| • (LP2) Financial services products and solutions | 20 credits |
| • (R07) Advanced mortgage advice | 15 credits |
| • (J02) Trusts | 20 credits |
| • (J03) The tax and legal aspect of business | 20 credits |
| • (J05) Pension income options | 20 credits |
| • (J10) Discretionary investment management | 20 credits |

Mo needs a further 140 credits, with a minimum of 120 at Advanced level including a pass in the compulsory unit (AF5) Financial planning process.

He passes the following units which reflect the focus within his role on pensions and investments:

- | | |
|--|------------|
| • (AF2) Business financial planning | 30 credits |
| • (AF4) Investment planning | 30 credits |
| • (AF5) Financial planning process | 30 credits |
| • (AF8) Retirement income planning | 30 credits |
| • (R02) Investment principles and risk | 20 credits |

Mo meets the 290 credit threshold and is awarded the Advanced Diploma in Financial Planning. As a member, he is entitled to use the designation APFS. Should he wish, he can apply for Chartered status and progress to Fellowship.



Investments and securities

Zara, a trainee financial advisor

Working towards the Diploma in Financial Planning as part of her traineeship, Zara wants to specialise in securities advice. She decides to build in the Certificate in Securities Advice and Dealing as part of her learning pathway.

Zara holds a mixture of Diploma units including:

- | | |
|---|------------|
| • (R01) Financial services, regulation and ethics | 20 credits |
| • (R02) Investment principles and risk | 20 credits |
| • (R04) Pensions and retirement planning | 10 credits |
| • (J02) Trusts | 20 credits |
| • (J03) The tax and legal aspects of business | 20 credits |
| • (J07) Supervision in a regulated environment | 20 credits |

In order to meet both qualification requirements and those of the FCA to advise, she undertakes the following units:

- | | |
|---------------------------------------|------------|
| • (R03) Personal taxation | 10 credits |
| • (J12) Securities advice and dealing | 20 credits |

Successfully passing these, Zara exceeds the 140 credit threshold and is awarded the Diploma in Financial Planning. She also meets the FCA requirement to advise, having passed unit J12. As a member, she is entitled to use the designations DipPFS CertPFS (Securities). She can continue her studies to the Advanced Diploma in Financial Planning.



Life and pensions

Alex, a pensions administrator

Wanting to develop his technical knowledge and grow the responsibilities of his current role, Alex decides to take the Certificate in Regulated Financial Services Operations.

Alex already holds the Award in Financial Administration, with the units:

- (CF1) UK Financial services, regulation and ethics 15 credits
- (FA2) Pensions administration 10 credits

In order to meet the qualification requirements and those of the FCA for his new role, he then chooses:

- (FA4) Collective investment scheme administration 10 credits

Successfully passing this, Alex meets the 35 credits threshold and is awarded the Certificate in Regulated Financial Services Operations. As a member, he is entitled to use the designations Cert CII (FS).



Mortgages and equity release

Rachel, a mortgage advisor

Rachel used to work as an estate agent, however is now keen to become a mortgage advisor. In order to advise, she needs to be qualified to Level 3, complying with FCA requirements. She decides to take the Certificate in Advanced Mortgage Advice.

Rachel has no formal knowledge of the sector, so decides to get a grounding in terminology and workings by taking:

- (CF1) UK financial services, regulation and ethics 15 credits

She then takes the Certificate's three core units:

- (R01) Financial services, regulation and ethics 20 credits
- (CF6) Mortgage advice 20 credits
- (R07) Advanced mortgage advice 15 credits

Successfully passing these units, Rachel meets the 45 credits threshold and is awarded the Certificate in Advanced Mortgage Advice. As a member, she is entitled to use the designations Cert SMP.

Award in Financial Planning

International only

RQF level:

N/A

CII credits:

15

Member designation:

CII (Award)

Recommended study time:

60 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£90

Non-member:

£100

Overview

The Award in Financial Planning provides foundation knowledge in the core financial and life assurance products. It offers guidance on what constitutes professional practice, providing a framework for ethical behaviour.

The Award is suitable for anyone working outside the UK in the insurance and financial services sector.

Completion requirements

The Award comprises one core unit, providing 15 credits on successful completion.

(AWF) Award in
Financial Planning
15 credits

Core

Assessment method

Two hour exam comprising 75 multiple choice questions. Results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-financial-planning

Award in Bancassurance

International only

RQF level:

N/A

CII credits:

15

Member designation:

CII (Award)

Recommended study time:

60 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£90

Non-member:

£100

Overview

Designed for financial advisors and insurance agents working in the banking sector, the Award in Bancassurance provides foundation knowledge in core financial, life assurance and insurance products. It offers guidance on what constitutes professional practice, providing a framework for ethical behaviour.

The Award is suitable for anyone working outside the UK in the insurance and financial services sector.

Completion requirements

The Award comprises one core unit, providing 15 credits on successful completion.

(AWB) Award in
Bancassurance
15 credits

Core

Assessment method

Two hour exam comprising 75 multiple choice questions. Results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-bancassurance

Award in Long Term Care Insurance

RQF level:

3

CII credits:

15

Member designation:

N/A

Recommended study time:

70 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£155

Non-member:

£190

Overview

The Level 3 Award in Long Term Care Insurance develops knowledge and understanding of long term care cover, including legal, taxation and regulatory issues and the responsibilities of local authorities. When held with the Diploma in Financial Planning or the Diploma in Regulated Financial Planning, it meets the FCA's appropriate qualification requirements for advising on long term care products and at-retirement advice.

Completion requirements

The Award comprises one core unit, providing 15 credits on successful completion.

(CF8) Long term care insurance

15 credits

Core

Assessment method

Two hour exam comprising 50 multiple choice questions (MCQs) and five case studies, each comprising five MCQs.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-longtermcare

Award in Pensions Update

RQF level:

4

CII credits:

10

Member designation:

N/A

Recommended study time:

50 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£140

Non-member:

£190

Overview

The Level 4 Award in Pensions Update develops and tests knowledge of pension reforms and how they impact at-retirement advice. It is particularly suitable for retail investment advisers wanting to develop their knowledge of pensions reforms, and paraplanners, technical consultants and staff in related support roles looking to increase their existing knowledge.

(R08) Pensions update will be withdrawn on 31 August 2018.

Completion requirements

The Award comprises one core unit, providing 10 credits on successful completion.

(R08) Pensions update

10 credits

Core

Assessment method

One hour exam comprising 40 multiple choice questions (MCQs) and one case study, comprising five MCQs.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-pensionsupdate

Certificate in Insurance and Financial Services

International only

RQF level:
N/A

CII credits:
40-45
depending on route

Member designation:
Cert CII

Recommended study time:
50-60 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:
£90
per unit

Non-member:
£100
per unit

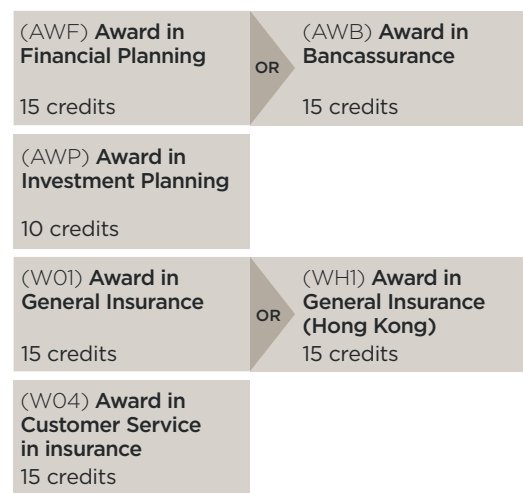
Overview

For candidates outside the UK who provide financial advice and also act as insurance agents, or aspire to, we offer a dedicated study pathway which results in the completion of the Certificate in Insurance and Financial Services.

In successfully completing three units you will gain a solid base of knowledge relevant to your role and qualify for the Certificate.

Completion requirements

The Certificate comprises three Award units from a choice of six and provides a total of 40-45 credits on successful completion.



Option units

Assessment method

Award level units are assessed by paper multiple choice question exam (MCQ), with results released five weeks following the exam sitting.

W01, WH1	Two hour exam, comprising 100 MCQs
W04	90 minutes exam, comprising 50 MCQs
AWP	One hour exam, comprising 50 MCQs which include two case studies, comprising four MCQs
AWB, AWF	Two hour exam, comprising 75 MCQs

More details and to enrol:
cii.co.uk/cert-ins-fs

Certificate in Paraplanning

Overview

The Level 4 Certificate in Paraplanning meets the specific needs of paraplanners, or those aspiring to be paraplanners. It is a dedicated qualification that develops core technical knowledge in a number of key advisory areas, and specialist report writing skills that improve your ability to provide sound professional advice.

Completion requirements

The Certificate comprises four core units from a choice of five, providing a total of 80 credits on successful completion.



Core

Assessment method

Certificate and Diploma level units are assessed by a mix of multiple choice question exams (MCQs), coursework assignments, and written exams.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting. Result notification for coursework assignments are released 40 days following your coursework submission.

R01, CF1, R02	Two hour exam, comprising 100 MCQs
R03	One hour exam, comprising 50 MCQs
J09	Three written coursework assignments, each typically 2,000 to 3,000 words

More details and to enrol:
cii.co.uk/cert-paraplanning

RQF level:
4

CII credits:
75-80

Member designation:
CertPFS (Paraplanning)

Recommended study time:
50-100 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:
£155
per unit

Non-member:
£190
per unit

Certificate in Pension Transfer Advice

RQF level:

4

CII credits:

70

Member designation:

N/A

Recommended study time:

50-100 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£185

per unit

Non-member:

£265

per unit

Overview

The Certificate in Pension Transfer Advice provides the in-depth knowledge and practical skills needed by anyone seeking to advise on the transfer of safeguarded benefits, an increasingly important part of the advice process following the Government's pension reforms. The Certificate satisfies the FCA's appropriate qualification requirements for advising on pension transfers.

Completion requirements

The Certificate comprises four core units, providing a total of 70 credits on successful completion.



Core

Assessment method

Diploma and Advanced Diploma level units are assessed by multiple choice question exam (MCQ) and written exam.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting. Result notification for written exams is on designated dates throughout the year, normally 6-8 weeks following the exam sitting.

R01, R02	Two hour exam, comprising 100 MCQs
R04	One hour exam, comprising 50 MCQs
AF7	Two-hour exam, comprising 3-4 written short answer questions and two case studies

More details and to enrol:
cii.co.uk/cert-pensiontransfers

Diploma in Regulated Financial Planning

Overview

The Level 4 Diploma in Regulated Financial Planning meets the FCA's qualification requirements in full for anyone advising on retail investment products.

The Diploma develops core technical knowledge and financial planning capabilities.

Completion requirements

The Diploma comprises six core units, providing 100 credits on successful completion.



Core

Assessment method

Diploma units are tested by multiple choice question exam (MCQ) and written exam.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting. Result notification for written exams are on designated dates throughout the year, normally 6-8 weeks following the exam sitting.

R01, R02	Two hour exam, comprising 100 MCQs
R03, R04, R05	One hour exam, comprising 50 MCQs
R06	Three hour exam, comprising two written case studies on financial planning practice. Candidates receive the case studies two weeks before the exam.

More details and to enrol:
cii.co.uk/dip-rfp

RQF level:

4

CII credits:

100

Member designation:

DipPFS

Recommended study time:

50-60 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£185

per unit

Non-member:

£265

per unit

Diploma in Financial Planning

RQF level:

4

CII credits:

140

Member designation:

DipPFS

Recommended study time:

50-100 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£140

per unit

Non-member:

£190

per unit

Overview

The Level 4 Diploma in Financial Planning meets the FCA's qualification requirements for advising on retail investment products, subject to additional gap fill. For more information, visit cii.co.uk/gapfill

Completion requirements

The Diploma comprises unit options from the CII Personal Finance qualifications framework, providing a total of 140 credits on successful completion. There are 37 units to choose from, including the Diploma in Regulated Financial Planning units listed previously, the Diploma units listed below and the Advanced Diploma units listed on the following page.

(J02) Trusts 20 credits	(J03) The tax and legal aspects of business 20 credits	(J05) Pension incomes options 20 credits
(J07) Supervision in a regulated environment 20 credits	(J09) Paraplanning 30 credits	(J10) Discretionary investment management 20 credits
(J11) Wrap and platform services 20 credits	(J12) Securities advice and dealing 20 credits	(R07) Advanced mortgage advice 15 credits
(R08) Pensions update 10 credits		

Option units

To complete you need to obtain 140 CII credits from across the CII Personal Finance qualifications framework, of which:

- At least 80 credits at Diploma level*
- A maximum of 30 credits at Advanced Diploma level

*See online for units treated as equivalent, e.g. withdrawn AFPC units.

Assessment method

Diploma level units are tested by multiple choice question exam (MCQ) and written exam.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting. Result notification for written exams is on designated dates throughout the year, normally 6-8 weeks following the exam sitting.

J02, J03, J05, J07	Two hour exam, comprising 15 short answer questions
J09	Three written coursework assignments, each typically 2,000 to 3,000 words
J10	Two hour exam, comprising 70 MCQs and four case studies, each comprising five MCQs
J11	Two hour exam, comprising short answer questions and two essay style questions
J12	Two hour exam, comprising 60 MCQs and three case studies, each comprising five MCQs
R07	Two hour exam, comprising 55 MCQs and four case studies, each comprising five MCQs
R08	One hour exam, comprising 40 MCQs and one case study, comprising five MCQs comprising five MCQs

More details and to enrol:
cii.co.uk/dip-financialplanning

Advanced Diploma in Financial Planning

RQF level:

6

CII credits:

290

Member designation:

APFS

Recommended study time:

100-150 hrs

per unit

Study package:

- Study text – print and ebook (no study text for AF5)
- Assessment entry
- Online support including exam guide via RevisionMate (exam guide not available for AF6 and AF8)

Starting at:

Member:

£265

per unit

Non-member:

£340

per unit

Overview

The Level 6 Advanced Diploma in Financial Planning builds on existing skills and knowledge, enabling advisers to develop specialist planning capabilities and offer a sophisticated and comprehensive approach to financial management.

Holders of the Advanced Diploma can apply for Chartered status or progress to Fellowship.

Completion requirements

The Advanced Diploma comprises one core unit and a number of option units from the CII Personal Finance qualifications framework, providing a total of 290 credits on successful completion.

120 credits must be at level 6 and include the core unit AF5. A further 40 credits must be at level 4 or above, and the remaining credits may come from any unit with the exception of unit LF1.

(AF5) **Financial planning process**
30 credits

Core



Option units

Assessment method

Diploma and Advanced Diploma level units are assessed by written exam or coursework assessment.

For written exams in April and October, results notification is on designated dates, normally 6-8 weeks following the exam sitting. For coursework assessment, results notification is 40 days following your coursework submission.

AF1, AF2, AF3, AF4	Three hour exam, comprising three case studies
AF5	Three hour exam. Candidates receive a Fact Find two weeks before the exam
AF6, AF8	Three written coursework assignments, each typically 2,000 to 3,000 words
AF7	Two hour exam, comprising 3-4 short answer questions and two case studies

More details and to enrol:

cii.co.uk/adip-financialplanning

Award in Investment Planning

International only

RQF level:
N/A

CII credits:
10

Member designation:
CII Award

Recommended study time:
50-60 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:
£90

Non-member:
£100

Overview

The Award in Investment Planning develops your knowledge of investment products. It offers guidance on what constitutes professional practice, providing a framework for ethical behaviour.

The Award is suitable for experienced non-UK Financial Advisers and Insurance Agents advising on, or aspiring to advise on, investment planning.

Completion requirements

The Award comprises one core unit, providing 10 credits on successful completion.

(AWP) Award in Investment Planning
10 credits

Core

Assessment method

One hour exam comprising 50 multiple choice questions (MCQs) and two case studies each comprising four MCQs. Results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-investment-planning

Certificate in Investment Operations

RQF level:
3

CII credits:
25

Member designation:
N/A

Recommended study time:
60-70 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:
£155
per unit

Non-member:
£190
per unit

Overview

The Level 3 Certificate in Investment Operations is an introductory qualification that provides the essential knowledge and skills needed by a wide range of operational staff working with investments. It develops a general understanding of financial services and provides practical insight into a choice from three areas of investment operations.

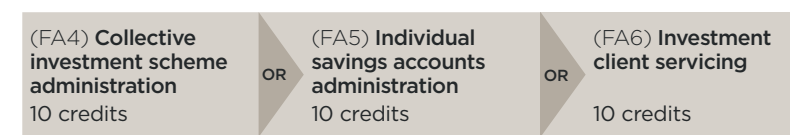
Importantly, the Certificate also satisfies the FCA qualification requirements for overseers of certain investment operations functions.

Completion requirements

The Certificate comprises one core unit and one option unit, providing a total of 25 credits on successful completion.



Core



Option units

Assessment method

Certificate and Diploma level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01, CF1	Two hour exam, comprising 100 MCQs
FA4, FA5, FA6	One hour exam, comprising 50 MCQs

More details and to enrol:
cii.co.uk/cert-investmentoperations

Certificate in Securities Advice and Dealing

RQF level:

4

CII credits:

70

Member designation:

CertPFS (Securities)

Recommended study time:

50-70 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£185
per unit

Non-member:

£265
per unit

Overview

The Level 4 Certificate in Securities Advice and Dealing satisfies the FCA's appropriate qualification requirements for advising on dealing in securities and is also suitable if you are working in a support role and want to develop your knowledge of this sector.

Diploma in Financial Planning holders should note that passing unit J12 satisfies the FCA's appropriate qualification requirements for advising on and dealing in securities.

Completion requirements

The Certificate comprises four core units, providing a total of 70 credits on successful completion.



Core

Assessment method

Diploma level units are assessed by multiple choice question exam (MCQ) or written exam.

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting. Result notification for written exams is on designated dates throughout the year, normally 6-8 weeks following the exam sitting.

R01, R02	Two hour exam, comprising 100 MCQs
R03	One hour exam, comprising 50 MCQs
J12	Two hour exam, comprising 60 MCQs and three case studies, each comprising five MCQs

More details and to enrol:
cii.co.uk/cert-securities

Certificate in Discretionary Investment Management

Overview

The Level 4 Certificate in Discretionary Investment Management develops the wealth strategy and portfolio management skills required for effective discretionary investment management. It also satisfies the FCA's appropriate qualification requirements for this class of business.

The Certificate is relevant if you outsource this activity, or if you are in an investment-related support role and wish to develop your knowledge of investments.

Completion requirements

The Certificate comprises two core units, providing a total of 40 credits on successful completion.



Core

Assessment method

Diploma level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01	Two hour exam, comprising 100 MCQs
J10	Two hour exam, comprising 70 MCQs and four case studies, each comprising five MCQs

More details and to enrol:
cii.co.uk/cert-investmentmanagement

RQF level:

4

CII credits:

40

Member designation:

CertPFS (DM)

Recommended study time:

60-80 hrs
per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£185
per unit

Non-member:

£265
per unit

Award in Life and Pensions Foundations

RQF level:

2

CII credits:

N/A

Member designation:

N/A

Recommended study time:

40 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Member:

£90

Non-member:

£100

Overview

The Level 2 Award in Life and Pensions Foundations introduces key life and pensions topics, including: customer needs and solutions across pensions, protection, investments and savings, the sector's value to society and the economy, and the importance of professional conduct and maintaining a customer focus.

The Award is particularly suitable if you are new to the sector, although is also suitable if you want to demonstrate and enhance your knowledge of the sector.

The Award is equally relevant for those in associated industries and support roles requiring an introduction to life and pensions.

Completion requirements

The Award comprises one core unit and does not provide any credits on completion.

(LF1) Life and pensions foundations
0 credits

Core

Assessment method

One-hour exam comprising 40 multiple choice questions (MCQs) and one case study comprising five MCQs.

For online MCQ exams result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

More details and to enrol:
cii.co.uk/award-ipf

Award in Financial Administration

RQF level:

3

CII credits:

25

Member designation:

N/A

Recommended study time:

60 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£155

per unit

Non-member:

£190

per unit

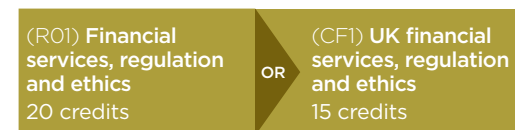
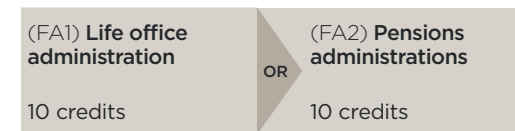
Overview

The Level 3 Award in Financial Administration is an introductory qualification providing essential knowledge of the financial services sector, the process of investment planning, and the administration of life or pensions business, depending on the unit selected.

Importantly, it satisfies FCA qualification requirements for overseers of certain administrative life and pensions functions.

Completion requirements

The Award comprises one core unit and one option unit, providing a total of 25 credits on successful completion.

**Core****Option units**

Assessment method

Certificate level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01, CF1	Two hour exam, comprising 100 MCQs
FA1, FA2	One hour exam, comprising 50 MCQs

More details and to enrol:
cii.co.uk/award-financialadministration

Certificate in Financial Services

RQF level:

3

CII credits:

Life and Pensions route:

45

General route:

55

Member designation:

Life and Pensions route:

Cert CII (Life and Pensions)

General route:

Cert CII (FS)

Recommended study time:

50-100 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£155

per unit

Non-member:

£190

per unit

Overview

The Level 3 Certificate in Financial Services is for anyone in an operational or technical support role, and offers targeted learning routes.

The **life and pensions route** develops knowledge and understanding of the sector's role and its activities. It considers important customer needs, solutions and products, and how individuals and organisations work within the regulatory and legislative environment.

It is particularly suitable for the life, pensions and long-term savings sector, including customer operations back-office staff and contact centre team leaders.

The **general route** develops fundamental knowledge of the financial services sector, including regulation, legislation, customer service, administration, marketing in financial services and key products.

It's ideal if you are providing operational support to financial planners, paraplanners and technical support staff.

Completion requirements

The **life and pensions** route comprises three core units, providing a total of 45 credits on successful completion.



The **general route** comprises two core units from a choice of three, providing a total of 55 credits on successful completion.



Core

Assessment method

Certificate and Diploma level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01, CF1	Two hour exam, comprising 100 MCQs
LP1	90 minute exam, comprising 15 MCQs and 35 MCQs linked to seven case studies
LP2	Two hour exam, comprising 75 MCQs
LP3	90 minute exam, comprising 50 MCQs

More details and to enrol:
cii.co.uk/cert-financialservices

Certificate in Regulated Financial Services Operations

RQF level:

3

CII credits:

35

Member designation:

Cert CII (FS)

Recommended study time:

60-70 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£155

per unit

Non-member:

£190

per unit

Overview

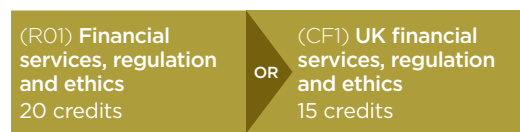
The Level 3 Certificate in Regulated Financial Services Operations (previously known as the Certificate in Financial Services, product-specific route) develops fundamental knowledge of the financial services sector, including regulation, legislation, and overseeing and administering financial products.

It suits those involved in or overseeing the operational delivery of life, pensions or investment products, in addition to other financial services support roles.

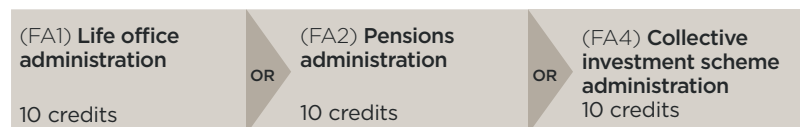
The Certificate is an ideal next-step for holders of the Award in Financial Administration or Certificate in Investment Operations, requiring completion of one further unit.

Completion requirements

The Certificate comprises one core unit and two option units, providing a total of 35 credits on successful completion.



Core



Option units

Assessment method

Certificate and Diploma level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01, CF1	Two hour exam, comprising 100 MCQs
FA1, FA2, FA4, FA5, FA6	One hour exam, comprising 50 MCQs

More details and to enrol:
cii.co.uk/cert-rfso

Certificate in Mortgage Advice

RQF level:

3

CII credits:

35

Member designation:

Cert CII (MP)

Recommended study time:

60-100 hrs

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£155

per unit

Non-member:

£190

per unit

Overview

The Level 3 Certificate in Mortgage Advice is essential if you want to be a mortgage adviser, but equally relevant if you work in a support role. It develops an understanding of the sector and the mortgage process and enables advisers to meet individual client needs.

Completion of the Certificate meets the FCA's appropriate qualification requirements for mortgage advisers.

Completion requirements

The Certificate comprises two core units from a choice of three, providing a total of 35 credits on successful completion.



Core

Assessment method

Certificate level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01, CF1	Two hour exam, comprising 100 MCQs
CF6	Three hour exam, comprising 100 MCQs and five case studies, each comprising five MCQs

More details and to enrol:
cii.co.uk/cert-mortgageadvice

Certificate in Equity Release

RQF level:

3

CII credits:

50

Member designation:

Cert CII (MP & ER)

Recommended study time:

60-100 hrs

per unit

Study package:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at

Member:

£155

per unit

Non-member:

£190

per unit

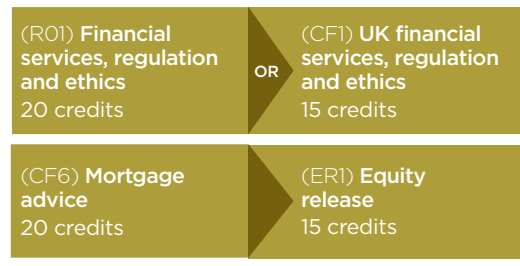
Overview

The Level 3 Certificate in Equity Release is relevant for anyone seeking to advise on equity release products (both home reversion plans and lifetime mortgages), and for those who work in a support role in this sector.

Holders of the Certificate meet the FCA's appropriate qualification requirements for advising on this class of business.

Completion requirements

The Certificate comprises three core units from a choice of four, providing a total of 50 credits on successful completion.



Core

Assessment method

Certificate level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01, CF1	Two hour exam, comprising 100 MCQs
CF6	Three hour exam, comprising 100 MCQs and five case studies, each comprising five MCQs
ER1	Two hour exam, comprising 50 MCQs and five case studies, each comprising five MCQs

More details and to enrol:
cii.co.uk/cert-equityrelease

Certificate in Advanced Mortgage Advice

Overview

The Level 4 Certificate in Advanced Mortgage Advice goes beyond the FCA's minimum qualification requirements and enables mortgage advisers to continue developing their advice capabilities. It also brings advisers and those working in support roles up to speed with recent changes to the mortgage process arising from the Mortgage Market Review.

The Certificate is an ideal next-step for candidates who hold the Certificate in Mortgage Advice or Certificate in Equity Release, only requiring completion of one further unit.

Completion requirements

The Certificate comprises three core units, providing a total of 55 credits on successful completion.



Core

Assessment method

Certificate and Diploma level units are assessed by multiple choice question exam (MCQ).

For online MCQ exams, result notification is immediate on completion. For paper-based MCQ exams, results are released five weeks following the exam sitting.

R01	Two hour exam, comprising 100 MCQs
CF6	Three hour exam, comprising 100 MCQs and five case studies, each comprising five MCQs
R07	Two hour exam, comprising 55 MCQs and four case studies, each comprising five MCQs

More details and to enrol:
cii.co.uk/cert-ama

RQF level:

4

CII credits:

55

Member designation:

Cert SMP

Recommended study time:

60-100 hrs

Study package:

Available study materials include:

- Study text – print and ebook
- Assessment entry
- Online support including exam guide via RevisionMate

Starting at:

Member:

£155

per unit

Non-member:

£190

per unit

Right by your side



Supporting your studies

For a single fee, each qualification unit comes with a study package included. Equipping you with the essential tools, study packages support core learning.

Study package

Available for select Award, Certificate and Diploma units

Study text with updates

Textbooks and ebooks encourage structured self-study to help you master the syllabus. Chapters define learning outcomes and include self-test questions. Study texts include electronic updates and access to a host of online study support services through our RevisionMate study tool.

Further information on ebooks and free sample chapters can be found online at cii.co.uk/ebooks

RevisionMate

Available when you enrol on any unit, RevisionMate gives free access to a suite of support tools designed to help you consolidate your learning and increase the chances of exam or coursework success.

These typically include:

- **Online study text** – provided for quick reference (requires internet connection)
- **Study planner** – build a routine and manage your time most effectively
- **Study tips** – get practical guidance on achieving the most from your studies

- **Student discussion forum** – share your queries and learn with peers
- **Quiz questions** – check understanding of the study text
- **Exam guide** – practise your exam technique by downloading the latest CII exam guide
- **Specimen coursework assignment and answers** – guide to the style and format of coursework questions and the depth and breadth of answers sought by examiners.

For more information, visit cii.co.uk/revisionmate

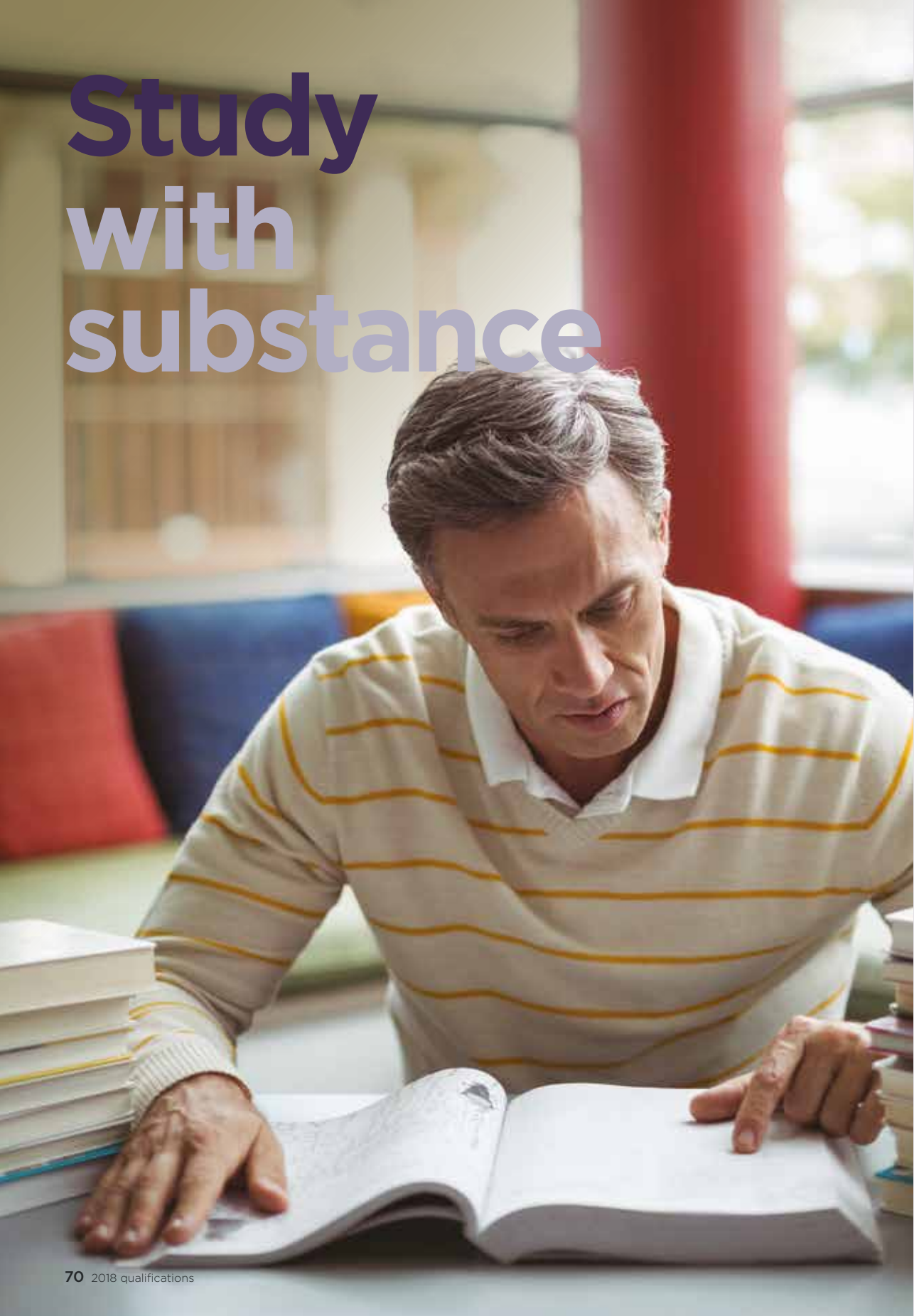
Exam guide

For online exams these comprise a complete mock exam with answers, highlighting syllabus areas covered and useful hints. For written exams these comprise a past paper with examiners' comments on candidates' performance and key points for inclusion in your answers. Specimen coursework assignments are available free of charge for units which offer mixed assessment or coursework assessment.

Exam guides are supplied as PDF files.

* Important note: We recommend you sit the exam during your study option's testing/enrolment period. However, exams can be sat up to 18 months from the point of purchase and a study option renewal service is available if needed.

Study with substance



Supporting your studies

As well as our core study packages, we offer additional study materials to help you pass first time. Look online for more details.

Study aids

Update your study text to the next edition

Available for select Certificate and Diploma level units

Starting at:
Member £15/ Non-Member £20 per unit

You can extend the life of your enrolment if your course has expired and receive the next edition of the study text together with electronic updates. This option is renewable on an annual basis and you will be sent a letter inviting you to update your material.

Keyfacts booklet

Available for select Certificate and Diploma level units

Starting at:
Member £27/ Non-Member £32 per unit

Comprehensive pocket-sized booklets summarising the key information contained in the coursebook. These are perfect for studying when travelling to and from work or in situations when reading a coursebook is impractical.

Learn interactive tutorial

Available for select Certificate and Diploma level units

Starting at:
Member £45/ Non-Member £50 per unit

Online tutorial learning providing highly interactive study, backed by an assessment tool to check understanding as you progress with your studies.

Learn is designed to complement, not replace, the primary study text. It provides visually engaging and therefore memorable learning, but it covers only key and difficult topics, not the entire syllabus.

Question pack

Available for select Certificate and Diploma level units

Starting at:
Member £27/ Non-Member £32 per unit

Delivered online through RevisionMate, question packs provide comprehensive self-testing of the unit syllabus. Depending on your unit, these contain 150-300 questions.

Audio revision

Available for select Diploma in Regulated Financial Planning and Advanced Diploma in Financial Planning units

Starting at:
Member £45/ Non-Member £50 per unit

MP3 audio material for R0 units cover the key elements of each subject and last between 3-5 hours, depending on the unit. The AF options cover key Diploma learning points that underpin application at Advanced level, together with exam technique guidance. Each lasts between 5-8 hours, depending on the unit selected.

Delivered online via RevisionMate, audio files are simple to download and are great for making use of time when travelling.

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"Chartered status increases my professional standing with my contemporaries in the insurance sector. It means I've committed to a code of ethics and adhere to continuing professional development, keeping my knowledge and skillset current in an ever-changing marketplace. Chartered status is a mark of trust, a kitemark for quality, and carries a strong reputation at home and abroad."

Ewart Hodge

FCII Chartered Insurance Practitioner

"Becoming Chartered was always something that I aspired to. For me, it represents more than recognition of knowledge and experience; it also shows that I am committed to being at the forefront of my profession and dedicated to the highest standards of learning and technical expertise. In terms of career development, it gives me the edge and credibility with clients and professional peers alike."

Kate Gannon

Chartered Financial Planner

A passion for professionalism



Fellowship

At the top of each qualification framework sits Fellowship, a prestigious title held by more than 5,000 globally.

Holders of the Advanced Diploma who meet the full eligibility requirements are encouraged to apply for the Fellowship programme.

The programme is flexible enabling it to be linked to work-based activity, or it can be aligned with study for other relevant qualifications such as a MSc or MBA.

Full details can be found online at cii.co.uk/fellowship

Fellowship Advisory Service

For further guidance and support prior to or during your Fellowship application, the Fellowship Advisory Service is on-hand. The service provides help and advice, however cannot provide technical information about a subject you may be studying. In these circumstances, we would advise seeking assistance from a mentor from your workplace or approaching your Local Institute.

To contact the Fellowship Advisory Service,
call: +44 (0)20 8530 0819
email: societies.fas@cii.co.uk

Your next steps



Begin your study

The best way to begin your study journey is to visit us online. Go to cii.co.uk/qualifications where you can find more detail on our qualifications.

If you cannot find what you are looking for, please contact Customer Service by calling +44 (0)20 8989 8464 or by emailing customer.serv@cii.co.uk

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Learning Statement:
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RevisionMate:
revisionmate.co.uk

Online exam centres:
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Exam policies:
cii.co.uk/exampolicies

CPD:
cii.co.uk/cpd

Exam timetable:
cii.co.uk/exam-timetable

Employer finance options



Funding your study

Companies often offer funding for Chartered Insurance Institute qualifications to support employees' career development. It's worth checking with your employer to see if this applies to you and what your entitlements are. Depending on your employer's procedures, this may alter your enrolment process so it's worth finding out before making a commitment.

If you are self-funding your studies, you can enrol at any time by visiting our website or contacting Customer Service.

cii.co.uk

+44 (0)20 8989 8464


customer.serv@cii.co.uk

You can view and enlarge a copy of this brochure
online at cii.co.uk/qualifications

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customer.serv@cii.co.uk
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