

PROFESSIONAL QUALIFICATIONS: EXAMINATION SUPPORT TRAINING

The period 2009-2012 will see thousands of advisers in all sectors, from stockbrokers to bancassurers, taking more challenging examinations that at least meet the QCA Level 4 standards. To explore this topic visit our website at www.rdrtraining.co.uk where you will find:-

- what exams currently meet this standard
- who offers them
- how they compare in terms of study time and approach

We have extensive experience in supporting people to pass first time and we recognise that people need help with different aspects such as learning, revision and practicing examination papers.

We can help people pass the CII Diploma JO papers, the IFS Diploma and the SII PCIAM examination in a number of ways. We work to provide organisations with highly flexible study and revision tuition from experts who are themselves suitably qualified.

We offer three different approaches to provide organisations with the intensity of study that they consider will best meet the speed with which they need people to achieve the qualification.



HOW WILL DELEGATES BENEFIT?

Attending our examination courses will enable you to: -

- Fully focus on the exam syllabus content
- Brush up on exam techniques
- Learn how to answer the questions in the way the examiner is looking for
- Practice past questions and receive feedback
- Discuss and clarify your understanding with industry colleagues and regulatory qualified learning and development specialists
- Have access to mock papers and for Diploma students the opportunity to sit a mock paper under exam conditions with feedback once it has been marked

TRAINING APPROACH

The course duration varies but we aim to cover the full syllabus. The content will be a combination of trainer input, knowledge sharing with interactive syndicate work case studies and practice questions.

When delivered in house we are happy to deliver the days consecutively or separately depending on your business constraints for courses of two days or more duration.

COURSE LEADERS:

All of our tutors meet our stringent criteria:-

- They hold the qualification or its equivalent
- They possess the skills to communicate complex issues clearly and facilitate groups effectively
- They have a proven track record in helping delegates to pass first time

INTENSIVE STUDY PROGRAMME	This 5 day residential course is ideal for people who feel more comfortable with learning the syllabus by being tutored rather than reading text.
BOOSTER PROGRAMME	Specifically designed for those who have been unable to devote sufficient time to pre-examination study and who require a boost to both their knowledge and examination technique before sitting the examination.
PRE EXAMINATION WORKSHOP	This event is designed to provide revision of particularly difficult areas of the syllabus and how best to structure answers to questions.. Attending this event increases the likelihood of a first time pass considerably.

We promise we will **never exceed 15 delegates** so you have ample opportunity to cover and discuss all areas of the syllabus and the support material and focus on passing the exam.

Course duration will vary depending on the examination you wish to study.

HOW TO BOOK

Please call our office on 01327 858292 to discuss your particular requirements.

Costs vary depending on the examination being taken and its duration, whether or not it is being provided exclusively in house or is being shared with other companies and if you taking advantage of Whittlebury Hall where all costs quoted will include full board and use of the leisure facilities.



CORPORATE TRAINING PARTNERSHIPS
for Financial Services Professionals

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QUALIFICATION	PAPERS COVERED (COURSE DURATION)
CII Diploma (QCA Level 4)	<ul style="list-style-type: none"> ➤ JO1 – Personal Taxation ➤ JO2 - Trusts ➤ JO3 – Tax and Legal ➤ JO4 – Pension funding options ➤ JO5 – Pension income options ➤ JO6 – Investment principles
SII Diploma (QCA Level 4 – 6)	<ul style="list-style-type: none"> ➤ Bond and Fixed Income Markets ➤ Financial Derivatives ➤ Fund Management ➤ Interpretation of Financial Statements ➤ Investment Analysis ➤ Regulation and Compliance* ➤ Private Client Investment Advice and Management** <p>To be awarded full the Diploma candidates are required to take 3 papers (2 if exemption applies) however to be awarded the Diploma in Regulation and Compliance completion of the Diploma paper* plus a regulatory paper from the certificate or IAQ suite is required. The PCIAM** has been given QCA Level 6 status as a stand alone paper and is sufficient for the provision of advice to retail clients post the RDR deadline.</p>
SII Certificates (QCA Level 3)	<ul style="list-style-type: none"> ➤ FSA Financial Regulation or Principles of Financial Regulation* ➤ Securities ➤ Derivatives ➤ Financial Derivatives ➤ Investment Management ➤ Investment & Risk** <p>*Regulatory paper plus one technical paper to gain Certificate Award **additionally those advising clients must obtain Investment & Risk paper.</p>
SII Investment Advice Qualification (QCA Level 3)	<ul style="list-style-type: none"> ➤ Introduction to Securities and investments* ➤ FSA Financial Regulation or Principles of Financial Regulation** ➤ Collective Investment Scheme Administration ➤ Global Securities Operations ➤ Private Client Administration ➤ ISA Administration ➤ ISA & CTF Administration <p>To be awarded the full IAQ candidates must pass a total of three papers which must include Introduction to Securities and Investment*, a regulatory paper** plus one technical paper.</p>
IFS School of Finance Diploma for Financial Advisers (DipFA) (QCA Level 4)	<ul style="list-style-type: none"> ➤ Financial Planning Principles (FPP) – Unit 1 ➤ Advanced Financial Advice (AFA) – Unit 2
IFS School of Finance Various (QCA Level 3)	<ul style="list-style-type: none"> ➤ Certificate for Financial Advisers (CeFA) ➤ Certificate in Mortgage Advice and Practice (CeMAP) ➤ Certificate in Regulated Complaints Handling (CeRCH) ➤ Certificate in Regulated Customer Care (CeRRC) ➤ Certificate in Supervising in a Regulated Environment (CeSRE)
CFA Society of UK (QCA level 3)	<ul style="list-style-type: none"> ➤ Investment Management Certificate (IMC)

Corporate Training Partnerships Ltd

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