



Chartered  
Insurance  
Institute

# Future Focus

2026 Qualifications Brochure



# Personal Finance Qualifications

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# Price List Explainer

## What does 'Enrolment' and 'Enrolment Plus' refer to?

Learners can purchase qualification units in two ways, either by Enrolment or Enrolment Plus

- **Enrolment** provides learners with the study text and assessment entry
- Whereas the **Enrolment Plus** option provides learners with the study text, assessment entry, plus selected revision aids at a discounted rate

## Why is a postage fee needed?

- A flat fee of \$33 is charged per order (not per item) when printed materials are ordered to cover the delivery costs

## What revision aids are available and how do they help?

Selected units have additional revision aids that can be purchased to maximise learning, these include;

- **Key Fact Booklets** – these aids summarise the key information contained in the study text and are perfect for studying on-the-go (available in digital or printed format)
- **Knowledge Checker\*** – delivered online via RevisionMate this tool provides comprehensive, flexible and interactive self-testing, helping learners track progress and strengthen their understanding of the study text\*
- **E-learn** – delivered online via RevisionMate to complement the study text, this module offers engaging study with interactive content to help reinforce your understanding of key topics.
- **Revision Extra** - available for IF1-2 and delivered mainly through videos, this digital course is created by subject experts to give their insight into the unit syllabus

## What is Coursework Resubmission?

- Coursework re-submission is the equivalent of an 'exam resit' but for a coursework assignment
- Coursework re-submission can be purchased when a fail grade has been received
- Coursework assignments can only be re-submitted twice and all re-submissions must be completed before the end of the enrolment period

## What is Review of Marking?

- This is a post result review of the original marking to ensure that the agreed mark scheme has been applied correctly
- it is available for written exam units (not multiple-choice question units) and coursework assignments
- Applications must be made within four weeks of the release date of the results

## What is 'Recognition of Prior Learning' (RPL) and how much does it cost?

Learners may be eligible to claim exemptions for relevant exams and qualifications obtained through other professional bodies or universities. Subject to the published qualification completion requirements, these can be used to help you achieve CII qualifications more quickly.

There are two pathways for RPL with the CII:

1. **RPL Path 1:** Prior learning awards for business, law and maths degrees are charged at **50% of the Enrolment price of the CII unit(s)**. The same applies to other qualifications whose learning outcomes and modules have a different structure to CII qualifications. These qualifications partially meet the learning outcomes across multiple CII units.
2. **RPL Path 2:** Prior learning awards for CII affiliated institutes' qualifications and other licence to practice qualifications are charged at **20% of the Enrolment price of the CII unit(s)**. Examples include (UK) FCA Appropriate Qualifications that are constructed around the same set of (regulatory) standards to the CII level 4 Diploma in Regulated Financial Planning and other qualifications whose modules and learning outcomes have the same structure as CII qualifications.

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |   | Digital Format |   |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M |

## Award in Life and Pensions Foundations

|   |       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|---|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| LF1 Life and Pensions Foundations   | \$161 | \$202 | \$161 | \$202 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| Exam Resit: Member price \$89 / Non-member price \$108  |       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
| Recognition of Prior Learning: Path 1 Member price \$80.50 / Non-member price \$101.00 Path 2 Member price \$32.20 / Non-member price \$40.40 |       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |

## Award in Financial Administration

|  |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |   |
|--|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|------|---|---|---|
| CF1 UK Financial Services, Regulation and Ethics   | \$236 | \$286 | \$236 | \$286 | \$33 | \$272 | \$332 | \$277 | \$332 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | -    | -    | - | - | - |
| R01 Financial Services, Regulation and Ethics  | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - | - |
| FA1 Life Office Administration   | \$236 | \$286 | \$236 | \$286 | \$33 | -     | -     | -     | -     | -    | \$29 | \$33 | \$29 | \$33 | \$33 | -    | -    | -    | -    | -    | -    | - | - | - |
| FA2 Pensions Administration  | \$236 | \$286 | \$236 | \$286 | \$33 | -     | -     | -     | -     | -    | \$29 | \$33 | \$29 | \$33 | \$33 | -    | -    | -    | -    | -    | -    | - | - | - |
| Exam Resit for units CF1, FA1, FA2: Member price \$182 / Non-member price \$217  |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |   |
| Exam Resit for unit R01: Member price \$198 / Non-member price \$247   |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |   |
| Recognition of Prior Learning for units CF1, FA1, FA2: Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20 |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |   |
| Recognition of Prior Learning for unit R01: Path 1 Member price \$135.00 / Non-member price \$189.50 Path 2 Member price \$54.00 / Non-member price \$75.80            |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |   |

| Enrolment      |            |                           |    |   | OR | Enrolment Plus |   |                           |   |    | Key Facts Booklet* |   |                           |   | Knowledge Checker* |       | E-learn*       |    |   |    |
|----------------|------------|---------------------------|----|---|----|----------------|---|---------------------------|---|----|--------------------|---|---------------------------|---|--------------------|-------|----------------|----|---|----|
| Digital Format |            | Printed & Digital Formats |    |   |    | Digital Format |   | Printed & Digital Formats |   |    | Digital Format     |   | Printed & Digital Formats |   | Digital Format     |       | Digital Format |    |   |    |
| Unit Code      | Unit Title | M                         | NM | M | NM | + P&P          | M | NM                        | M | NM | + P&P              | M | NM                        | M | NM                 | + P&P | M              | NM | M | NM |

### International Qualifications

|     |   |
|-----|---|
| AWF | Award in Financial Planning (non-UK)    |
| HFE | Award in Financial Planning (Hong Kong) |
| AWP | Award in Investment Planning (non-UK)   |
| AWB | Award in Bancassurance (non-UK)         |

Member price \$134 / Non-member price \$155

Exam Resit:

Path 1 Member price \$111.50 / Non-member price \$133.50      Path 2 Member price \$44.60 / Non-member price \$53.40

### Certificate in Insurance and Financial Services (International)

|     |  |
|-----|--|
| AWF | Award in Financial Planning (International)            |
| AWB | Award in Bancassurance (International)                 |
| W01 | Award in General Insurance (International)             |
| WH1 | Award in General Insurance (Hong Kong)                 |
| AWP | Award in Investment Planning (International)           |
| W04 | Award in Customer Service in Insurance (International) |

Member price \$134 / Non-member price \$155

Recognition of Prior Learning:

Path 1 Member price \$115.50 / Non-member price \$133.50      Path 2 Member price \$44.60 / Non-member price \$53.40

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |    |  |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|----|--|
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|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M | NM |  |
|           |            |                |    |                           |    |       |                |    |                           |    |       |                    |    |                           |    |                    |   |                |   |                |   |                |   |    |  |

## Award in Long Term Care Insurance

CF8 Long Term Care Insurance

|       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| \$236 | \$286 | \$236 | \$286 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

Member price \$182 / Non-member price \$217

Recognition of Prior Learning:

Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20

## Certificate in Investment Operations

CF1 UK Financial Services, Regulation and Ethics

|       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |   |   |   |   |
|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|---|---|---|---|
| \$236 | \$286 | \$236 | \$286 | \$33 | \$277 | \$332 | \$277 | \$332 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | - | - | - | - |
|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|---|---|---|---|

Member price \$182 / Non-member price \$217  
Exam Resit for unit R01:  
Member price \$198 / Non-member price \$247

R01 Financial Services, Regulation and Ethics

|       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|------|---|---|
| \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |
|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|------|---|---|

FA5 Individual Savings Account Administration

|       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| \$236 | \$286 | \$236 | \$286 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|

Recognition of Prior Learning for units CF1, FA5:

Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20  
Recognition of Prior Learning for unit R01:

Path 1 Member price \$135.00 / Non-member price \$189.50 Path 2 Member price \$54.00 / Non-member price \$75.80



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**KEY:**  
M: Member  
NM: Non-Member  
\*: Included as standard in Enrolment Plus  
+P&P: Plus postage & packaging

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |   | Digital Format |   |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M |

## Certificate in Regulated Financial Services Operations

|     |  |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |   |   |   |
|-----|--|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|---|---|---|
| CF1 | UK Financial Services, Regulation and Ethics | \$236 | \$286 | \$236 | \$286 | \$33 | \$277 | \$332 | \$261 | \$313 | \$33 | \$29 | \$33 | \$29 | \$33 | \$29 | \$33 | \$41 | \$46 | -    | -    | - | - | - |
| R01 | Financial Services, Regulation and Ethics    | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - | - |
| FA1 | Life Office Administration                   | \$236 | \$286 | \$236 | \$286 | \$33 | -     | -     | -     | -     | -    | \$29 | \$33 | \$29 | \$33 | \$33 | \$33 | -    | -    | -    | -    | - | - | - |
| FA2 | Pensions Administration                      | \$236 | \$286 | \$236 | \$286 | \$33 | -     | -     | -     | -     | -    | \$29 | \$33 | \$29 | \$33 | \$33 | \$33 | -    | -    | -    | -    | - | - | - |
| FA5 | Individual Savings Account Administration    | \$236 | \$286 | \$236 | \$286 | \$33 | -     | -     | -     | -     | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | - | - | - |

Exam Resit for units CF1, FA1, FA2, FA5: Member price \$182 / Non-member price \$217

Exam Resit for unit R01: Member price \$198 / Non-member price \$247

Recognition of Prior Learning for units CF1, FA1, FA2, FA5: Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20

Recognition of Prior Learning for unit R01: Path 1 Member price \$135.00 / Non-member price \$189.50 Path 2 Member price \$54.00 / Non-member price \$75.80

## Certificate in Securities Advice and Dealing

|     |   |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |   |   |   |
|-----|---|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|---|---|---|
| R01 | Financial Services, Regulation and Ethics | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |   |
| R02 | Investment Principles and Risk            | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |   |
| R03 | Personal Taxation                         | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |   |
| J12 | Securities Advice and Dealing             | \$270 | \$379 | \$270 | \$379 | \$33 | -     | -     | -     | -     | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | - | - | - |

Exam Resit: Member price \$198 / Non-member price \$247

Recognition of Prior Learning: Path 1 Member price \$135.00 / Non-member price \$189.50 Path 2 Member price \$54.00 / Non-member price \$75.80

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |   | Digital Format |   |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M |

## Certificate in Mortgage Advice

|   |  |  |       |       |       |      |       |       |       |       |      |      |      |      |  |      |      |      |      |      |      |   |   |   |   |  |  |
|---|--|--|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|--|------|------|------|------|------|------|---|---|---|---|--|--|
| CF1   | UK Financial Services, Regulation and Ethics | \$236  | \$286 | \$236 | \$286 | \$33 | \$277 | \$332 | \$277 | \$332 | \$33 | \$29 | \$33 | \$29 | \$33   | \$29 | \$33 | \$41 | \$46 | -    | -    | - | - | - | - |  |  |
| R01   | Financial Services, Regulation and Ethics    | \$270  | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33   | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - | - | - |  |  |
| CF6   | Mortgage Advice                              | \$236  | \$286 | \$236 | \$286 | \$33 | \$277 | \$332 | \$277 | \$332 | \$33 | \$29 | \$33 | \$29 | \$33   | \$29 | \$33 | \$41 | \$46 | -    | -    | - | - | - | - |  |  |
| Exam Resit for units CF1, CF6:                    |  | Member price \$182 / Non-member price \$217              |       |       |       |      |       |       |       |       |      |      |      |      |  |      |      |      |      |      |      |   |   |   |   |  |  |
| Exam Resit for unit R01:                          |  | Member price \$198 / Non-member price \$247              |       |       |       |      |       |       |       |       |      |      |      |      |  |      |      |      |      |      |      |   |   |   |   |  |  |
| Recognition of Prior Learning for units CF1, CF6: |  | Path 1 Member price \$118.00 / Non-member price \$143.00 |       |       |       |      |       |       |       |       |      |      |      |      | Path 2 Member price \$47.20 / Non-member price \$57.20 |      |      |      |      |      |      |   |   |   |   |  |  |
| Recognition of Prior Learning for unit R01:       |  | Path 1 Member price \$135.00 / Non-member price \$189.50 |       |       |       |      |       |       |       |       |      |      |      |      | Path 2 Member price \$54.00 / Non-member price \$75.80 |      |      |      |      |      |      |   |   |   |   |  |  |

## Certificate in Advanced Mortgage Advice

|  |   |  |       |       |       |      |       |       |       |       |      |      |      |      |  |      |      |      |      |      |      |   |   |   |   |   |  |
|--|---|--|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|--|------|------|------|------|------|------|---|---|---|---|---|--|
| R01  | Financial Services, Regulation and Ethics | \$270  | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33   | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - | - | - |   |  |
| CF6  | Mortgage Advice                           | \$236  | \$286 | \$236 | \$286 | \$33 | \$277 | \$332 | \$277 | \$332 | \$33 | \$29 | \$33 | \$29 | \$33   | \$29 | \$33 | \$41 | \$46 | -    | -    | - | - | - | - |   |  |
| R07  | Advanced Mortgage Advice                  | \$270  | \$379 | \$270 | \$379 | \$33 | -     | -     | -     | -     | -    | -    | -    | -    | -  | -    | -    | -    | -    | -    | -    | - | - | - | - | - |  |
| Exam Resit for unit CF6:                         |   | Member price \$182 / Non-member price \$217              |       |       |       |      |       |       |       |       |      |      |      |      |  |      |      |      |      |      |      |   |   |   |   |   |  |
| Exam Resit for units R01, R07:                   |   | Member price \$198 / Non-member price \$247              |       |       |       |      |       |       |       |       |      |      |      |      |  |      |      |      |      |      |      |   |   |   |   |   |  |
| Recognition of Prior Learning for units CF6:     |   | Path 1 Member price \$118.00 / Non-member price \$143.00 |       |       |       |      |       |       |       |       |      |      |      |      | Path 2 Member price \$47.20 / Non-member price \$57.20 |      |      |      |      |      |      |   |   |   |   |   |  |
| Recognition of Prior Learning for unit R01, R07: |   | Path 1 Member price \$135.00 / Non-member price \$189.50 |       |       |       |      |       |       |       |       |      |      |      |      | Path 2 Member price \$54.00 / Non-member price \$75.80 |      |      |      |      |      |      |   |   |   |   |   |  |

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |       | Videos         |    |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|-------|----------------|----|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |       | Digital Format |    |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | + P&P | M              | NM |

## Certificate in Equity Release

|   |  |       |       |       |  |      |       |       |       |  |      |      |      |      |   |      |      |      |      |  |      |      |   |   |
|---|--|-------|-------|-------|--|------|-------|-------|-------|--|------|------|------|------|---|------|------|------|------|--|------|------|---|---|
| CF1   | UK Financial Services, Regulation and Ethics | \$236 | \$286 | \$236 | \$286  | \$33 | \$277 | \$332 | \$277 | \$332  | \$33 | \$29 | \$33 | \$29 | \$33  | \$33 | \$29 | \$33 | \$41 | \$46   | -    | -    | - | - |
| R01   | Financial Services, Regulation and Ethics    | \$270 | \$379 | \$270 | \$379  | \$33 | \$349 | \$478 | \$328 | \$449  | \$30 | \$27 | \$30 | \$27 | \$30  | \$30 | \$27 | \$30 | \$38 | \$43   | \$71 | \$78 | - | - |
| CF6   | Mortgage Advice                              | \$236 | \$286 | \$236 | \$286  | \$33 | \$277 | \$332 | \$277 | \$332  | \$33 | \$29 | \$33 | \$29 | \$33  | \$33 | \$29 | \$33 | \$41 | \$46   | -    | -    | - | - |
| ER1   | Equity Release                               | \$236 | \$286 | \$236 | \$286  | \$33 | -     | -     | -     | -  | -    | \$29 | \$33 | \$29 | \$33  | \$33 | -    | -    | -    | -  | -    | -    | - | - |
| Exam Resit for units CF1, CF6, ER1:<br>Member price \$182 / Non-member price \$217<br>Exam Resit for unit R01:<br>Member price \$198 / Non-member price \$247 |  |       |       |       |  |      |       |       |       |  |      |      |      |      |   |      |      |      |      |  |      |      |   |   |
| Recognition of Prior Learning for units CF1, CF6, ER1:  |  |       |       |       | Path 1 Member price \$118.00 / Non-member price \$143.00 |      |       |       |       | Path 2 Member price \$47.20 / Non-member price \$57.20 |      |      |      |      | Recognition of Prior Learning for unit R01: |      |      |      |      | Path 1 Member price \$135.00 / Non-member price \$189.50 |      |      |   |   |

## Certificate in Financial Services (General Route)

|  |  |       |       |       |  |      |       |       |       |  |      |      |      |      |   |      |      |      |      |  |      |      |   |   |
|--|--|-------|-------|-------|--|------|-------|-------|-------|--|------|------|------|------|---|------|------|------|------|--|------|------|---|---|
| CF1  | UK Financial Services, Regulation and Ethics | \$236 | \$286 | \$236 | \$286  | \$33 | \$277 | \$332 | \$277 | \$332  | \$33 | \$29 | \$33 | \$29 | \$33  | \$33 | \$29 | \$33 | \$41 | \$46   | -    | -    | - | - |
| R01  | Financial Services, Regulation and Ethics    | \$270 | \$379 | \$270 | \$379  | \$33 | \$379 | \$478 | \$379 | \$478  | \$33 | \$29 | \$33 | \$29 | \$33  | \$30 | \$29 | \$33 | \$41 | \$46   | \$71 | \$78 | - | - |
| LP2  | Financial Services Products and Solutions    | \$236 | \$286 | \$236 | \$286  | \$33 | -     | -     | -     | -  | -    | -    | -    | -    | -   | -    | -    | -    | -    | -  | -    | -    | - | - |
| Exam Resit for units CF1, LP2:<br>Member price \$182 / Non-member price \$217<br>Exam Resit for unit R01:<br>Member price \$198 / Non-member price \$247 |  |       |       |       |  |      |       |       |       |  |      |      |      |      |   |      |      |      |      |  |      |      |   |   |
| Recognition of Prior Learning for units CF1, LP2:  |  |       |       |       | Path 1 Member price \$118.00 / Non-member price \$143.00 |      |       |       |       | Path 2 Member price \$47.20 / Non-member price \$57.20 |      |      |      |      | Recognition of Prior Learning for unit R01: |      |      |      |      | Path 1 Member price \$135.00 / Non-member price \$189.50 |      |      |   |   |

|           |            | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|
| Unit Code | Unit Title | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |   | Digital Format |   |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M |

### Certificate in Financial Services (Life and Pensions route)

|     |  |       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|-----|--|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| LP1 | Life and Pensions Customer Operations      | \$236 | \$286 | \$236 | \$286 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| LP2 | Financial Services Products and Solutions  | \$236 | \$286 | \$236 | \$286 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
| LP3 | Life and Pensions Principles and Practices | \$236 | \$286 | \$236 | \$286 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |

Exam Resit: Member price \$182 / Non-member price \$217

Recognition of Prior Learning: Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20

### Certificate in Discretionary Investment Management

|     |   |       |       |       |       |       |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
|-----|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|------|---|---|
| R01 | Financial Services, Regulation and Ethics | \$270 | \$379 | \$270 | \$379 | \$33  | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |
| J10 | Discretionary Investment Management       | \$270 | \$379 | \$270 | \$379 | \$270 | -     | -     | -     | -     | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | - | - |

Exam Resit: Member price \$198 / Non-member price \$247

Recognition of Prior Learning: Path 1 Member price \$135.00 / Non-member price \$189.50 Path 2 Member price \$54.00 / Non-member price \$75.80

|           |            | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|
| Unit Code | Unit Title | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |   | Digital Format |   |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M |

## Certificate in Paraplanning

|  |  |   |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
|--|--|---|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|------|---|---|
| R01  | Financial Services, Regulation and Ethics    | \$270   | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |
| CF1  | UK Financial Services, Regulation and Ethics | \$236   | \$286 | \$236 | \$286 | \$33 | \$277 | \$332 | \$277 | \$332 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | -    | -    | - | - |
| R02  | Investment Principles and Risk               | \$270   | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |
| R03  | Personal Taxation                            | \$270   | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$83 | - | - |
| J09  | Paraplanning                                 | \$385   | \$470 | \$385 | \$470 | \$33 | -     | -     | -     | -     | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | -    | - | - |
| Exam Resit for units R01, R02, R03:                    |  | Member price \$198 / Non-member price \$247   |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
| Exam Resit for unit CF1:                               |  | Member price \$182 / Non-member price \$217   |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
| Coursework Resubmission for unit J09:                  |  | Member price \$198 / Non-member price \$247   |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
| Review of Marking (available for unit J09 only):       |  | Member price \$122 / Non-member price \$122   |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
| Recognition of Prior Learning for units R01, R02, R03: |  | Path 1 Member price \$135.00 / Non-member price \$189.50 Path 2 Member price \$54.00 / Non-member price \$75.80 |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
| Recognition of Prior Learning for unit CF1:            |  | Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20 |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |
| Recognition of Prior Learning for unit J09:            |  | Path 1 Member price \$192.50 / Non-member price \$235.00 Path 2 Member price \$77.00 / Non-member price \$94.00 |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |   |   |

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    |       | Knowledge Checker* |    | E-learn*       |    | Audio*         |    | Videos         |    |  |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|-------|--------------------|----|----------------|----|----------------|----|----------------|----|--|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    |       | Digital Format     |    | Digital Format |    | Digital Format |    | Digital Format |    |  |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P | M                  | NM | M              | NM | M              | NM | M              | NM |  |
|           |            |                |    |                           |    |       |                |    |                           |    |       |                    |    |                           |    |       |                    |    |                |    |                |    |                |    |  |

## Diploma in Regulated Financial Planning

|     |   |       |       |       |       |      |       |       |       |       |      |      |      |      |      |      |      |      |      |      |      |      |       |       |
|-----|---|-------|-------|-------|-------|------|-------|-------|-------|-------|------|------|------|------|------|------|------|------|------|------|------|------|-------|-------|
| R01 | Financial Services, Regulation and Ethics | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$78 | -     | -     |
| R02 | Investment Principles and Risk            | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$78 | -     | -     |
| R03 | Personal Taxation                         | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$78 | -     | -     |
| R04 | Pensions & Retirement Planning            | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$78 | -     | -     |
| R05 | Financial Protection                      | \$236 | \$286 | \$236 | \$286 | \$33 | \$312 | \$441 | \$312 | \$441 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | \$29 | \$33 | \$41 | \$46 | \$76 | \$78 | -     | -     |
| R06 | Financial Planning Practice               | \$270 | \$379 | \$270 | \$379 | \$33 | \$349 | \$478 | \$349 | \$478 | \$33 | \$29 | \$33 | \$29 | \$33 | \$33 | -    | -    | \$41 | \$46 | \$76 | \$78 | \$163 | \$193 |

Exam Resit for units R01, R02, R03, R04, R06:

Member price \$198 / Non-member price \$247

Exam Resit for unit R05:

Member price \$182 / Non-member price \$217

Review of Marking (available for Unit Code R06 only):

Member price \$122 / Non-member price \$122

Recognition of Prior Learning for units R01, R02, R03, R04, R06:

Path 1 Member price \$135.00 / Non-member price \$189.50

Recognition of Prior Learning for unit R05:

Path 1 Member price \$118.00 / Non-member price \$143.00

Path 2 Member price \$54.00 / Non-member price \$75.80

Path 2 Member price \$47.20 / Non-member price \$57.20

## Award in Regulated Pension Transfer Advice

|     |                    |   |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|-----|--------------------|---|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| AF7 | Pension Transfers  | \$365                                       | \$481 | \$365 | \$481 | \$33 | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - | - |
|     |                    |   |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|     | Exam Resit:        | Member price \$235 / Non-member price \$327 |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |
|     | Review of Marking: | Member price \$122 / Non-member price \$122 |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |

Recognition of Prior Learning for unit AF7:

Path 1 Member price \$182.50 / Non-member price \$240.50 Path 2 Member price \$73.00 / Non-member price \$96.20



Chartered  
Insurance  
Institute

|             |  |
|-------------|--|
| <b>KEY:</b> |  |
| M:          | Member                                 |
| NM:         | Non-Member                             |
| *           | Included as standard in Enrolment Plus |
| +P&P:       | Plus postage & packaging               |

| Unit Code | Unit Title                             | Enrolment      |       |                           |       | Enrolment Plus |   |                           |   | Key Facts Booklet* |          |                           |    | Knowledge Checker* |    | E-learn*       |   | Audio*         |   | Videos         |   |    |
|-----------|--|----------------|-------|---------------------------|-------|----------------|---|---------------------------|---|--------------------|----------|---------------------------|----|--------------------|----|----------------|---|----------------|---|----------------|---|----|
|           |  | Digital Format |       | Printed & Digital Formats |       | Digital Format |   | Printed & Digital Formats |   | Digital Format     |          | Printed & Digital Formats |    | Digital Format     |    | Digital Format |   | Digital Format |   | Digital Format |   |    |
|           |  | M              | NM    | M                         | NM    | +<br>P&P       | M | NM                        | M | NM                 | +<br>P&P | M                         | NM | M                  | NM | +<br>P&P       | M | NM             | M | NM             | M | NM |
| J10       | Discretionary Investment Management    | \$270          | \$379 | \$270                     | \$379 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |
| J12       | Securities Advice and Dealing          | \$270          | \$379 | \$270                     | \$379 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |
| J02       | Trusts                                 | \$270          | \$379 | \$270                     | \$379 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |
| J05       | Pension Income Options                 | \$270          | \$379 | \$270                     | \$379 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |
| J07       | Supervision in a Regulated Environment | \$270          | \$379 | \$270                     | \$379 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |
| J09       | Paraplanning                           | \$385          | \$470 | \$385                     | \$470 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |
| R07       | Advanced Mortgage Advice               | \$270          | \$379 | \$270                     | \$379 | \$33           | - | -                         | - | -                  | -        | -                         | -  | -                  | -  | -              | - | -              | - | -              | - | -  |

## Diploma in Financial Planning

|  |  |  |       |       |       |      |   |   |   |   |   |  |   |   |   |   |   |   |   |   |   |   |
|--|--|--|-------|-------|-------|------|---|---|---|---|---|--|---|---|---|---|---|---|---|---|---|---|
| J10  | Discretionary Investment Management    | \$270  | \$379 | \$270 | \$379 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| J12  | Securities Advice and Dealing          | \$270  | \$379 | \$270 | \$379 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| J02  | Trusts                                 | \$270  | \$379 | \$270 | \$379 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| J05  | Pension Income Options                 | \$270  | \$379 | \$270 | \$379 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| J07  | Supervision in a Regulated Environment | \$270  | \$379 | \$270 | \$379 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| J09  | Paraplanning                           | \$385  | \$470 | \$385 | \$470 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| R07  | Advanced Mortgage Advice               | \$270  | \$379 | \$270 | \$379 | \$33 | - | - | - | - | - | -  | - | - | - | - | - | - | - | - | - | - |
| Exam Resit for units J10, J12, J02, J05, J07, R07:<br>Coursework Resubmission for unit J09:                          |  | Member price \$198 / Non-member price \$247<br>Member price \$198 / Non-member price \$247                           |       |       |       |      |   |   |   |   |   |  |   |   |   |   |   |   |   |   |   |   |
| Review of Marking (available for units J02, J05, J07, J09 only):   |  | Member price \$122 / Non-member price \$122  |       |       |       |      |   |   |   |   |   |  |   |   |   |   |   |   |   |   |   |   |
| Recognition of Prior Learning for units J10, J12, J02, J05, J07, R07:<br>Recognition of Prior Learning for unit J09: |  | Path 1 Member price \$135.00 / Non-member price \$189.50<br>Path 1 Member price \$192.50 / Non-member price \$235.00 |       |       |       |      |   |   |   |   |   | Path 2 Member price \$54.00 / Non-member price \$75.80<br>Path 2 Member price \$77.00 / Non-member price \$94.00 |   |   |   |   |   |   |   |   |   |   |

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           | Knowledge Checker* |                | E-learn* |                | Audio* |                | Videos |    |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|--------------------|----------------|----------|----------------|--------|----------------|--------|----|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |                    | Digital Format |          | Digital Format |        | Digital Format |        |    |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM                 | + P&P          | M        | NM             | M      | NM             | M      | NM |

## Advanced Diploma in Financial Planning

|     |                                   |       |       |       |       |      |   |   |   |   |   |   |   |   |   |   |   |       |       |       |   |
|-----|-----------------------------------|-------|-------|-------|-------|------|---|---|---|---|---|---|---|---|---|---|---|-------|-------|-------|---|
| AF1 | Personal Tax and Trust Planning   | \$365 | \$481 | \$365 | \$481 | \$33 | - | - | - | - | - | - | - | - | - | - | - | \$121 | \$135 | -     | - |
| AF4 | Investment Planning               | \$365 | \$481 | \$365 | \$481 | \$33 | - | - | - | - | - | - | - | - | - | - | - | \$121 | \$135 | -     | - |
| AF5 | Financial Planning Process**      | \$235 | \$327 | -     | -     | -    | - | - | - | - | - | - | - | - | - | - | - | -     | \$243 | \$291 | - |
| AF7 | Pension Transfers                 | \$365 | \$481 | \$365 | \$481 | \$33 | - | - | - | - | - | - | - | - | - | - | - | -     | -     | -     | - |
| AF6 | Senior Management and Supervision | \$365 | \$481 | \$365 | \$481 | \$33 | - | - | - | - | - | - | - | - | - | - | - | -     | -     | -     | - |
| AF8 | Retirement Income Planning        | \$365 | \$481 | \$365 | \$481 | \$33 | - | - | - | - | - | - | - | - | - | - | - | -     | -     | -     | - |

Exam Resit for units AF1, AF4, AF5, AF7:  
 Coursework Resubmission for units AF6, AF8:

Member price \$235 / Non-member price \$327  
 Member price \$198 / Non-member price \$247

Review of Marking:

Member price \$122 / Non-member price \$122

Recognition of Prior Learning for units AF1, AF4, AF7:

Path 1 Member price \$182.50 / Non-member price \$240.50

Path 2 Member price \$73.00 / Non-member price \$96.20

Recognition of Prior Learning for unit AF5:

Path 1 Member price \$117.50 / Non-member price \$163.50

Path 2 Member price \$47.00 / Non-member price \$65.40

Recognition of Prior Learning for units AF6, AF8:

Path 1 Member price \$210.50 / Non-member price \$258.50

Path 2 Member price \$84.20 / Non-member price \$103.40

\*\* A case-study workbook is not offered for this unit as it draws together and tests knowledge gained through the study of other AF units.

• Learners receive a 'fact-find' two weeks before the exam, from which a financial plan will need to be drawn up in the exam.

• Therefore, this enrolment consists of an examination entry only

| Unit Code | Unit Title | Enrolment      |    |                           |    |       | Enrolment Plus |    |                           |    |       | Key Facts Booklet* |    |                           |    | Knowledge Checker* |   | E-learn*       |   | Audio*         |   | Videos         |   |    |   |    |
|-----------|------------|----------------|----|---------------------------|----|-------|----------------|----|---------------------------|----|-------|--------------------|----|---------------------------|----|--------------------|---|----------------|---|----------------|---|----------------|---|----|---|----|
|           |            | Digital Format |    | Printed & Digital Formats |    |       | Digital Format |    | Printed & Digital Formats |    |       | Digital Format     |    | Printed & Digital Formats |    | Digital Format     |   | Digital Format |   | Digital Format |   | Digital Format |   |    |   |    |
|           |            | M              | NM | M                         | NM | + P&P | M              | NM | M                         | NM | + P&P | M                  | NM | M                         | NM | + P&P              | M | NM             | M | NM             | M | NM             | M | NM | M | NM |

## Group Risk

GR1 Group Risk

\$236 \$286 \$236 \$286 \$33

Exam Resit:

Member price \$182 / Non-member price \$217

Recognition of Prior Learning :

Path 1 Member price \$118.00 / Non-member price \$143.00 Path 2 Member price \$47.20 / Non-member price \$57.20



Chartered  
Insurance  
Institute

**KEY:**  
 M: Member  
 NM: Non-Member  
 \*: Included as standard in Enrolment Plus  
 +P&P: Plus postage & packaging

## Further Learning

|  | M              | NM      |
|--|----------------|---------|
| <b>Partnered Courses &amp; Qualifications</b>              |                |         |
| Certificate in Climate Risk                                | <b>\$864</b>   | \$864   |
| Introduction to Data Science and AI for Insurance Course   | <b>\$1,623</b> | \$2,028 |
| <b>Spotlight Focus Courses</b>                             |                |         |
| SDRs and Anti-Greenwashing Rule                            | <b>\$29</b>    | \$38    |
| <b>Spotlight Courses</b>                                   |                |         |
| ESG & Sustainable Investment                               | <b>\$117</b>   | \$160   |
| Consumer Duty Digital Learning Suite Bundle                | <b>\$160</b>   | \$271   |
| > Consumer Duty Practice Diagnostic Tool                   | <b>\$1</b>     | \$77    |
| > Overview of Consumer Duty Regulations                    | <b>\$13</b>    | \$18    |
| > <u>Spotlight</u> : Consumer Duty Good Practice Examples  | <b>\$62</b>    | \$81    |
| > <u>Spotlight</u> : Consumer Duty Action Planning Process | <b>\$123</b>   | \$160   |

All prices include VAT (where VAT is applicable)



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# Qualification Completion Prices\*

## \*Notes:

All qualification completion prices are indicative and based on:

1. Purchase of the digital and print format Enrolment Only package<sup>A</sup> for each unit taken
2. An assumption that each unit is passed at the first attempt with no exam resits involved
3. Postage & Packing costs (\$30 per order) not being included in the cost shown – the number of orders placed to complete a qualification will vary by individual

<sup>A</sup> *Revisions aids can be purchased at extra cost either individually or through the Enrolment Plus package where available*

# Advanced Diploma in Financial Planning price is based on an illustration where 120 credits have been obtained from Advanced Diploma units, 140 credits have been obtained from Diploma units and the remainder of the 290 required credits have been achieved from Certificate units - Other combinations are possible and consequently will have a different price to the one shown here

| Enrolment |    |
|-----------|----|
| M         | NM |

| Enrolment |    |
|-----------|----|
| M         | NM |

| Personal Finance Qualifications                                 | Total Cost |         |
|---|------------|---------|
| Award in Financial Planning (International)                     | \$223      | \$267   |
| Award in Bancassurance (International)                          | \$223      | \$267   |
| Award in Investment Planning (International)                    | \$223      | \$267   |
| Award in Financial Planning (Hong Kong)                         | \$223      | \$267   |
| Certificate in Insurance and Financial Services (International) | \$669      | \$801   |
| *****   | *****      | *****   |
| Award in Life & Pensions Foundations                            | \$161      | \$202   |
| Award in Long Term Care Insurance                               | \$226      | \$286   |
| Award in Financial Administration                               | \$506      | \$665   |
| Certificate in Investment Operations                            | \$506      | \$665   |
| Certificate in Regulated Financial Services Operations          | \$796      | \$1,085 |

| Personal Finance Qualifications                           | Total Cost |           |
|---|------------|-----------|
| Certificate in Mortgage Advice                            | \$472      | \$572     |
| Certificate in Advanced Mortgage Advice                   | \$776      | \$1,044   |
| Certificate in Equity Release                             | \$708      | \$858     |
| Certificate in Financial Services (general route)         | \$506      | \$665     |
| Certificate in Financial Services (life & pensions route) | \$708      | \$858     |
| Award in Regulated Pension Transfer Advice                | \$365      | \$481     |
| Certificate in Discretionary Investment Management        | \$540      | \$758     |
| Certificate in Paraplanning                               | \$1,195    | \$1,607   |
| Certificate in Securities Advice and Dealing              | \$1,080    | \$1,516   |
| Diploma in Regulated Financial Planning                   | \$1,586    | \$2,181   |
| Diploma in Financial Planning                             | \$2,005    | \$2,744   |
| Advanced Diploma in Financial Planning                    | \$3,966 #  | \$5,255 # |