



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	NM

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														

Unit Code		Unit Title				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	
						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)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
HFE	Award in Financial Planning (Hong Kong)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
AWP	Award in Investment Planning (non-UK)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
AWB	Award in Bancassurance (non-UK)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Exam Resit:		Member price \$134 / Non-member price \$155																			
Recognition of Prior Learning:		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)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
AWB	Award in Bancassurance (International)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
W01	Award in General Insurance (International)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
WH1	Award in General Insurance (Hong Kong)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
AWP	Award in Investment Planning (International)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
W04	Award in Customer Service in Insurance (International)	\$223	\$267	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	-	-
Exam Resit:		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	
		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

## Award in Long Term Care Insurance

CF8	Long Term Care Insurance	\$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 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	-	-	-	-
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		-	-	-	-	-		-	-	-	-	-	-	-	-	-	-	-	-	
Exam Resit for units CF1, 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, 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														

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

## 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	\$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	-	-	-	-	-	-	-	-
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	\$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	\$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	-	-
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	NM

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	\$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	-	-
CF6	Mortgage Advice	\$236	\$286	\$236	\$286	\$33	\$277	\$332	\$277	\$332	\$33	\$29	\$33	\$29	\$33	\$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	\$33	\$29	\$33	\$41	\$46	\$76	\$83	-	-
CF6	Mortgage Advice	\$236	\$286	\$236	\$286	\$33		\$277	\$332	\$277	\$332	\$33		\$29	\$33	\$29	\$33	\$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	M	NM	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:		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, 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						Path 2 Member price \$54.00 / Non-member price \$75.80																		

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:		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, 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						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	NM

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												

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

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
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Recognition of Prior Learning for units R01, R02, R03, R04, R06:	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 R05:	Path 1 Member price \$118.00 / Non-member price \$143.00	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	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
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Exam Resit:	Member price \$235 / Non-member price \$327
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Review of Marking:	Member price \$122 / Non-member price \$122
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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
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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

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:		Member price \$198 / Non-member price \$247																				
Coursework Resubmission for unit J09:		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:		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 J09:		Path 1 Member price \$192.50 / Non-member price \$235.00										Path 2 Member price \$77.00 / Non-member price \$94.00										

		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	M	NM	M	NM	M	NM	
Unit Code	Unit Title																					

## 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: Member price \$235 / Non-member price \$327  
 Coursework Resubmission for units AF6, AF8: 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.
- Leaners 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		M	NM		M	NM		M

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																					

## Further Learning

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

All prices include VAT (where VAT is applicable)



# 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>^</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>^</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

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

Enrolment	
M	NM

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 #