Chartered Insurance Institute

Standards. Professionalism. Trust.

2027 qualifications:

Your guide to studying with us



Champion Change

About us

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and personal finance professions. Over 120,000 members commit to high professional standards and continuing professional development.

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

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

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

Find out more at: cii.co.uk

Our vision

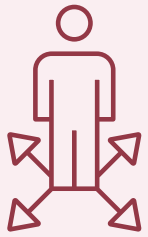
Our vision is to build public trust across the insurance and personal finance professions by providing relevant learning, insightful leadership and an engaged membership. Driving professional standards is at the heart of everything we do. Ethical conduct and technical competence are supported by our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

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Your journey, our commitment

We are here to support you and your career development, whether you're new to the sector or a professional looking to progress your career aspirations.



Tailor your qualification pathway

The flexibility of our qualifications framework allows you to select units that match the requirements of your current role or future career aspirations. We use a range of assessment methods, all carefully chosen and designed to promote the optimum type of learning for each level and qualification.

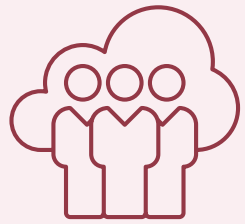
Find out more on pages 14-69.



Earn recognition for your prior learning

If you hold a degree or professional qualification in a relevant subject, such as accounting, business, maths or law, you could receive CII credits that count towards completion of a CII qualification. In doing so, you could reduce duplication of learning and achieve your qualification more quickly.

Find out more on pages 10-11.



Membership – with you throughout your career

Becoming a member offers many advantages and supports you throughout your professional journey. Membership accelerates career ambitions by developing skills and expertise faster. Our members are committed to ongoing professional development and champion the sharing of good practice to improve consumer outcomes.

Find out more on pages 6-7.

Our societies, local institutes and professional communities provide many opportunities to connect with others in similar positions to you. They support you at every stage of your career by focusing on the issues that matter most in your sector.

Find out more on pages 8-9.

Qualified members of the Chartered Insurance Institute or Personal Finance Society proudly share their member designations, with Chartered status and Fellowship representing the pinnacle of membership. All are widely recognised by your peers, employers and the general public.

To see the full list of designations available, head to pages 80-81.

Dedicated to your development

Our members are committed to ongoing professional development and champion the sharing of good practice to improve consumer outcomes. As a member, you can enjoy content designed to enhance your knowledge and keep you ahead of the curve.

Standards

Be part of a professional body that's recognised and respected by employers, regulators and your professional peers. We play a pivotal role within the profession, setting standards for competence and influencing future direction.

Professionalism

Our members are highly respected for their knowledge and expertise. Membership supports your professional development, enhances your career potential and integrates you into a network of like-minded professionals.

Trust

Public trust is at the heart of all that we do. Our Royal Charter ensures we never lose sight of our mission. We help to unite the profession, increasing its credibility with consumers. Together, we drive confidence in the power of professional standards.

Continuing Professional Development (CPD)

Members commit to ongoing learning and development, helping to ensure their knowledge remains up to date and relevant. We have created a programme of physical and digital events – alongside a wealth of online resources – to ensure your professional development is at the forefront of your membership.

cii.co.uk/cpd

Ethical culture

By adhering to our Code of Ethics, members commit to upholding high professional standards of integrity, probity and ethical fair dealing. Ethics are a cornerstone of professionalism, and ethical behaviour is crucial to securing public trust and confidence in the profession.

cii.co.uk/code

Extensive member network

A core benefit of your membership is access to an unrivalled network of local hubs throughout the UK, Channel Islands and the Isle of Man. 51 Local Institutes in addition to 26 Personal Finance Society Regional Committees provide you with access to local events and activities that help fulfil your professional expectations and grow your professional network.

eMentoring

Membership includes free access to a brilliant online mentoring platform called Connect. Develop your skills and knowledge with the help of an experienced mentor from elsewhere in the profession.

cii.co.uk/connect

The Learning Content Hub

For digital content that informs and inspires, whilst meeting your professional development needs, browse our Hub for topical and business relevant resources including: good practice guides, videos, webinars, eBooks, blogs and podcasts – many of which are produced by some of the most influential minds in insurance and personal finance.

cii.co.uk/learning-content-hub

Member discounts

As a member, you will benefit from significant discounts (typically over 20%) on exams, study materials and recognition of prior learning.

Visit our website to discover many other membership benefits, including Perks (discounts on travel & experiences, gym memberships and special offers from a wide range of retailers), together with health & wellbeing resources and a free legal helpline (UK only).

cii.co.uk/membership/benefits

How to become a member

Visit here to be contacted by a CII/PFS representative: **cii.co.uk/membership-enquiry**

Visit here to join online: **cii.co.uk/membership**

For corporate membership, email: **business.enquiries@cii.co.uk**

Join your professional community

Our societies and professional communities are dedicated to supporting you at every stage of your career, focusing on the issues that matter most in your sector.

By becoming a member of a society or professional community, you are joining other professionals committed to driving the profession forward through technical expertise, ethical behaviour, and a culture of learning and development.

Business relevant insights

Guided by an Advisory Board of leading market practitioners, each group addresses developments relevant to your sector through insights and good practice guidance.

They work closely with key sectoral stakeholders to help identify emerging trends, with research and thought leadership providing you with the confidence to make key decisions.

Supporting your career needs

Each society or community is committed to your ongoing professional development which means supporting you throughout every stage of your career. Whilst professional qualifications demonstrate your technical competence, membership provides you with the insights and resources to help you progress.

By providing focused CPD content opportunities along with a dedicated programme of digital and face-to-face events, your society offers access to the content that matters most to you, helping you to build a strong professional network and advance your career.

Our members say:

"The training, the events, the magazine – it all works. I am a member of other institutes and the CII feels more organised, easier to navigate and more focused."

Feedback received via member survey.

Personal Finance Society

The leading professional body in the UK for the personal finance profession.

thepfs.org

Society of Mortgage Professionals

Dedicated to those working in the mortgage market.

smp.org.uk

PFS Local

Through our network of volunteer led PFS local communities, members receive access to dedicated career support and personal development opportunities close to home.

thepfs.org/membership/pfs-local-committees/

Professional communities

These specialist communities are for professionals working in broking, claims and underwriting.

cii.co.uk/membership/professional-communities

Local Institutes

Through our network of 51 Local Institutes, members can access local CPD, networking and professional development opportunities, helping them build connections, share knowledge and engage with their profession within their local area.

cii.co.uk/membership/local-institutes

How to join your society or professional community

New members can select their society or professional community when joining to be a member. If you are an existing member, you can join or amend your society or professional community through the 'Member Status' section on your My CII / My PFS dashboard.

Join today
cii.co.uk/membership/join-us

Recognition not repetition



Recognition of prior learning

Before studying with us, check whether your previous qualifications from other professional bodies, institutes or universities count towards a CII qualification. It could save repeated learning and reduce your qualification costs.

To find out if you're eligible, details of the fee payable and to make an application, visit:

cii.co.uk/prior-learning

Professional Map

- Underwriting
- Claims
- Broking
- Protection advice
- Financial planning & advice
- Paraplanning
- Mortgage broking
- Supporting functions



- Curiosity
- Customer focus
- Drive to deliver
- Impact
- Inclusivity
- Insight
- Integrity

- Ethics & compliance
- Data & technology
- Core practice

The Professional Map is the international benchmark for professional excellence in the insurance and personal finance professions. This market-led competency framework and career development tool outlines the professional behaviours and technical expertise needed to thrive in your role, advance your career and develop teams.

Built around three key pillars

At the core of the Professional Map are three key components guiding your professional journey:

- **Technical expertise:** refers to the role-specific knowledge and skills you need to excel in your role, i.e. *what* you know.
- **Behaviours:** refer to the mind-set and actions that shape decision-making and work relationships, i.e. *how* you apply what you know.
- **Enablers:** refer to the awareness and understanding of aspects of your working environment that facilitate professional practice.

For practitioners and team leaders

The Professional Map empowers you to navigate your career development and build effective teams. Use it to:

- **Enhance your skillset:** Gain valuable insights to personalise your development journey.
- **Guide your career:** Prepare confidently for appraisals and job applications.
- **Empower your team:** Articulate expectations and promote a culture of growth.

Why not start by self-assessing your skills: **ciigroup.org/en/professional-map/individuals/self-assess-your-skills**

For employers

The Professional Map is a strategic asset for organisations: it identifies the future-focused skills needed to drive innovation and meet changing customer needs, underpinned by ethics and professionalism. Use it across the entire employee life cycle and connect talent management and professional development to better business and customer outcomes.

Testimonials

"The map outlines industry-wide competency standards across various roles, ensuring consistency and setting a benchmark for excellence" Claims manager

"I feel empowered to take charge of my professional development and it's helped me to communicate my goals to key stakeholders with ease" Graduate broker

"The map goes beyond technical underwriting goals. It also pinpoints the behavioural skills that make a well-rounded underwriter" Commercial underwriter

Get in touch:

Request more information about how the Professional Map can support your business, get in touch here: **ciigroup.wufoo.com/forms/professional-map-information-request**

Find out more here:
ciigroup.org/en/professional-map

Quality assured learning

Formed in consultation with experienced market practitioners and registered with Ofqual in the Regulated Qualifications Framework (RQF)*, our qualifications are quality assured.

Choosing the qualification that's right for you

Our qualifications range in difficulty to ensure we meet the needs of individuals at different stages in their career. We indicate the difficulty of a qualification by attributing it an RQF level: the higher the RQF level, the more the qualification demands from the learner.

The level of qualification you obtain can act as an indicator of your understanding of the subject for employers and your wider network to recognise.

RQF level 2

Level 2 qualifications build a basic understanding of the sector and its key topics that can be applied to common situations.

Qualifications at this level typically provide an introduction to topics within insurance and personal finance, and are ideal for those in trainee or junior roles, those new to the sector, or those working in roles that support technical areas of an organisation, such as Human Resources or Information Technology.

Approximate level of study:
GCSE

RQF level 3

Level 3 qualifications develop an understanding of the key principles, processes and products in greater detail that can be applied to practice.

Qualifications at this level are ideal for those looking to appreciate the fundamental practices of key topics at junior to mid-level roles.

Level 3 qualifications within personal finance provide licences to practice in areas such as mortgage and equity release advice, and in some oversight roles such as life and pensions office administration.

Approximate level of study:
A-Level

RQF level 4

Level 4 qualifications build a deeper technical and applied understanding of principles, processes and products, enabling analysis of core and specialist areas.

Qualifications at this level are suited to those who wish to have their technical or specialist applied knowledge and skills recognised through formal qualifications for technical roles.

Level 4 qualifications within personal finance provide a licence to practice for retail investment advice and advanced professional recognition for mortgage advisers.

Approximate level of study:
First year of undergraduate study

Your Learning Statement

To help you plan your study journey, your personalised Learning Statement will keep a record of your units and credits as you achieve them. It will also explain how they contribute towards further qualifications.

Request your learning statement online. Registration is simple and free.

RQF levels in context

We have summarised each RQF level descriptor below, along with how each of our qualifications' content and objectives correspond to that level. This should help you identify those that match your skills and experience as well as your career aspirations. For each RQF level, we have signposted qualification equivalents to help you further understand their difficulty. More information on qualification equivalents can be found on the Ofqual website.

The colours assigned to the RQF levels have been applied to their respective qualifications throughout this brochure. You'll also notice our qualifications are labelled 'Award', 'Certificate', 'Diploma' and 'Advanced Diploma' to help you determine their size. The recommended study hours for an Award would be significantly less than that of an Advanced Diploma.

RQF level 6

Level 6 qualifications develop the ability to apply advanced or specialised understanding to complex situations.

Within the insurance profession, level 6 qualifications are suited to managers of technical functions such as claims, broking or underwriting.

Within the personal finance profession, level 6 qualifications provide recognition that you have consolidated and enhanced your technical knowledge to use in complex client scenarios where options must be carefully analysed and balanced.

Approximate level of study:
Bachelor's degree

RQF level 7

Level 7 qualifications develop the ability to use specialised skills, research and analysis to evaluate and propose enhanced ways of working within the sector and in professional practice in situations where there are many interacting factors.

Qualifications give recognition to professionals who are taking the sector forward through researching and proposing strategies and new ways of working that will bring benefits to the sector and its customers.

Approximate level of study:
Master's degree

*CII RQF qualifications are also regulated by CCEA using the RQF and regulated by Qualifications Wales using the Credit and Qualification Framework Wales (CQFW). The CQFW level for each qualification mirrors the RQF level.

Insurance qualifications

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Advanced Diploma in Insurance 34

Insurance units

This is the framework for our insurance qualification units.
They are grouped according to their difficulty, from level 2 through to level 7.
Depending on the qualification you want to achieve, you'll need to study a number of these units. Some of our qualifications require just one unit while others require several.

RQF level: 2
CII credit level: Award

(FIT) Foundation Insurance Test
6 credits
40 study hours

RQF level: 3 equivalent
CII credit level: Certificate

Not available in the UK

The following units are not registered as part of the UK's Regulated Qualifications Framework (RQF).

(W01) Award in General Insurance (non-UK) [1]
15 credits
50 study hours

(WH1) Award in General Insurance (Hong Kong) [2]
15 credits
50 study hours

(W04) Award in Customer Service in Insurance (non-UK)
15 credits
50 study hours

(WCE) Insurance Claims Handling (non-UK) [3]
15 credits
60 study hours

(WUE) Insurance Underwriting (non-UK) [4]
15 credits
60 study hours

RQF level: 3
CII credit level: Certificate

(IF1) Insurance, Legal and Regulatory
15 credits
60 study hours

(IF2) General Insurance Business
15 credits
60 study hours

(IF3) Insurance Underwriting Process
15 credits
60 study hours

(IF4) Insurance Claims Handling Process
15 credits
60 study hours

(IF5) Motor Insurance Products
15 credits
60 study hours

(IF6) Household Insurance Products
15 credits
60 study hours

(IF7) Healthcare Insurance Products
15 credits
60 study hours

(IF8) Packaged Commercial Insurances
15 credits
60 study hours

(IF9) Customer Service in Insurance
15 credits
60 study hours

(I10) Insurance Broking Fundamentals
15 credits
60 study hours

(I11) Introduction to Risk Management
15 credits
60 study hours

(GR1) Group Risk
10 credits
50 study hours

(LM1) London Market Insurance Essentials
10 credits
40 study hours

(LM2) London Market Insurance Principles and Practices
15 credits
60 study hours

(LM3) London Market Underwriting Principles
15 credits
60 study hours

RQF level: 4
CII credit level: Diploma

(M05) Insurance Law
25 credits
120 study hours

(M66) Delegated Authority
25 credits
100 study hours

(M67) Fundamentals of Risk Management
25 credits
100 study hours

(M80) Underwriting Practice
20 credits
80 study hours

(M81) Insurance Broking Practice
20 credits
80 study hours

(M85) Claims Practice
20 credits
80 study hours

(M86) Personal Insurances
20 credits
80 study hours

(M90) Cargo and Goods in Transit Insurances
25 credits
100 study hours

(M91) Aviation and Space Insurance
30 credits
120 study hours

(M92) Insurance Business and Finance
25 credits
100 study hours

(M93) Commercial Property and Business Interruption Insurances
25 credits
100 study hours

(M94) Motor Insurance
25 credits
100 study hours

(M96) Liability Insurances
25 credits
100 study hours

(M97) Reinsurance
30 credits
120 study hours

(M98) Marine Hull and Associated Liabilities
30 credits
100 study hours

RQF level: 6
CII credit level: Advanced Diploma

(530) Economics and Business
30 credits
150 study hours

(820) Advanced Claims
30 credits
150 study hours

(930) Advanced Insurance Broking
30 credits
150 study hours

(945) Marketing Insurance Products and Services
30 credits
150 study hours

(960) Advanced Underwriting
30 credits
150 study hours

(990) Insurance Corporate Management
30 credits
150 study hours

(992) Risk Management in Insurance
30 credits
150 study hours

(995) Strategic Underwriting
30 credits
150 study hours

(996) Strategic Claims Management
30 credits
150 study hours

(997) Advanced Risk Financing and Transfer
30 credits
150 study hours

RQF level: 7
CII credit level: Advanced Diploma

(993) Advances in Strategic Risk Management in Insurance
50 credits
180 study hours

Notes

1. Unit W01 is also available in Arabic (W02) and in Simplified Chinese (WM1).
2. Unit WH1 is also available in Traditional Chinese (HGT). Both WH1 and HGT are available to candidates in Hong Kong only.
3. Unit WCE is also available in Arabic (WCA).
4. Unit WUE is also available in Arabic (WUA).

Study and assessment key

Assessment methods vary depending on the unit's level and subject matter. Each unit within the framework has been assigned an icon, to identify the assessment method from the options below.

Multiple choice question (MCQ) exam
Enrolment is valid for 12 months from the date of enrolment. MCQ exams can be sat at UK and international online exam centres, subject to availability, or via remote invigilation.

Mixed assessment
Enrolment is valid for 18 months from the date of enrolment. Candidates must pass a coursework assignment within the first 6 months and an MCQ exam within 18 months.

Coursework assignments
Enrolment is valid for 12 months from the date of enrolment. Candidates must pass three written assignments, each typically 3,200-4,200 words.

Award for the Foundation Insurance Test

2
RQF level

N/A
Member designation

40 hrs
Recommended study time per unit

Overview

The Level 2 Award for the Foundation Insurance Test is an introductory-level qualification that helps you develop an understanding of key insurance topics: how the insurance market operates, fundamental risk and insurance principles and procedures, and core personal and commercial insurance products.

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

Completion requirements

The Award comprises one core unit. This can then be used towards further CII qualifications.

(FIT) Foundation Insurance Test
6 credits

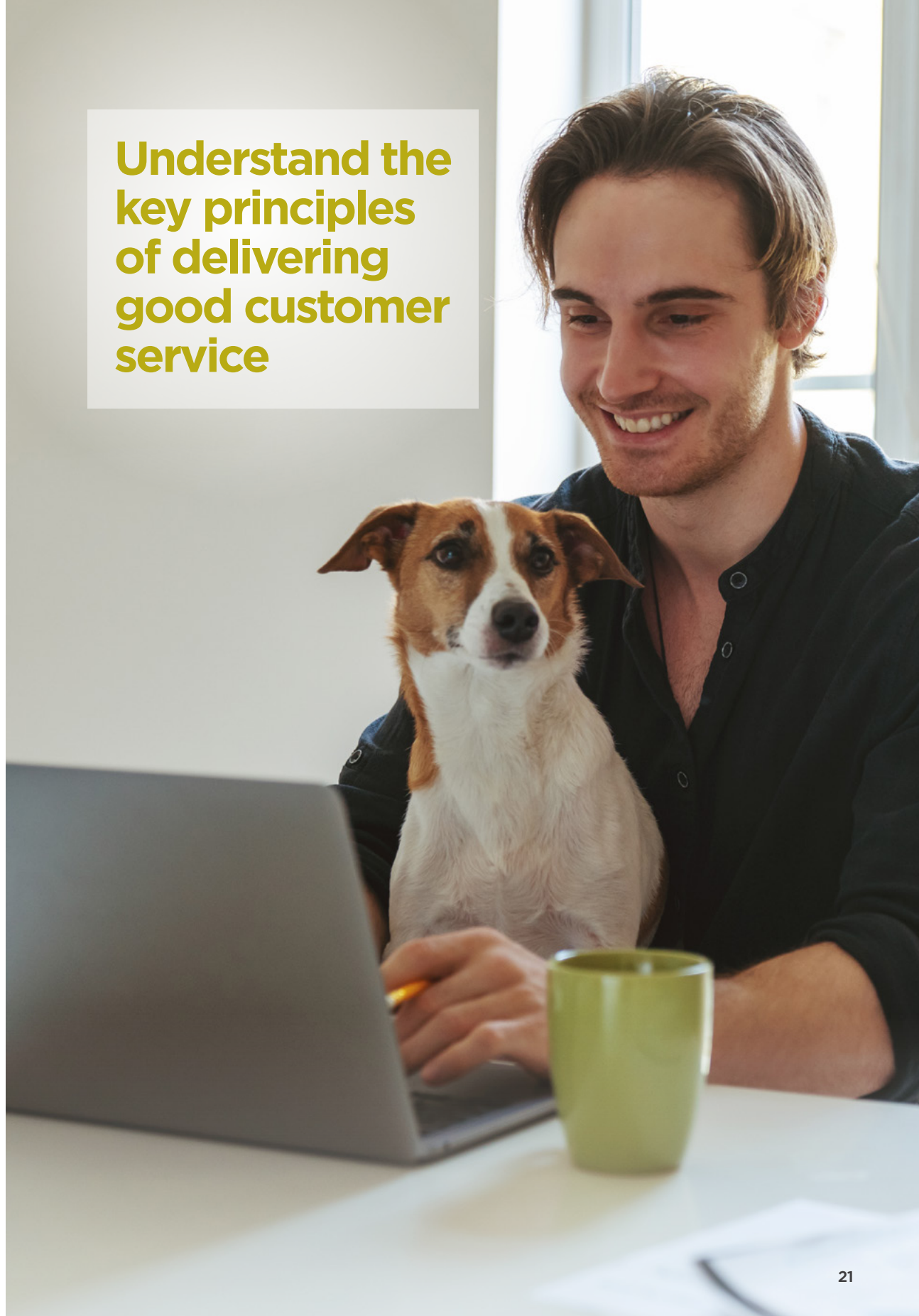
Core

See pages 18-19 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/FIT



Award in General Insurance (Hong Kong)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

50 hrs
Recommended study time per unit

Overview

The Award in General Insurance (Hong Kong) is similar to the Award in General Insurance (non-UK) but is specific to the Hong Kong regulatory environment. The Award is an introductory-level qualification that helps develop your knowledge and understanding of insurance principles, local procedures and products.

It is suitable for new entrants to the profession or insurance practitioners at the beginning of their career seeking to build on existing knowledge through formal study. It also meets the operating standards set by the Hong Kong regulator.

Also available in Traditional Chinese, (HGT).

Completion requirements

The Award comprises one core unit. This can then be used towards further CII qualifications.

(WH1) Award in General Insurance (Hong Kong)
15 credits

Core

See pages 18-19 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-general-insurance-hk



Insurance

Award in General Insurance (non-UK)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

50 hrs
Recommended study time per unit

Overview

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

It's particularly suitable if you're a non-UK insurance practitioner at the beginning of your career or seeking to build on existing knowledge through formal study. It also meets the operating standards set by the local regulator.

Also available in Arabic, (W02) and in Simplified Chinese, (WM1).

Completion requirements

The Award comprises one core unit. This can then be used towards further CII qualifications.

(W01) Award in General Insurance (non-UK)
15 credits

Core

See pages 18-19 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-general-insurance



Award in Customer Service in Insurance (non-UK)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

50 hrs
Recommended study time per unit

Overview

The Award in Customer Service in Insurance (non-UK) provides an essential introduction to the customer service function specific to insurance companies, intermediaries and providers. It helps build knowledge and understanding of the key processes and requirements related to good customer service.

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

Completion requirements

The Award comprises one core unit. This can then be used towards further CII qualifications.

(W04) Award in Customer Service in Insurance (non-UK)
15 credits

Core

See pages 18-19 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-customer-service

Certificate in Insurance and Financial Services (non-UK)

N/A
RQF level (equivalent to level 3)

Cert CII
Member designation

50-60 hrs
Recommended study time per unit

Overview

The Certificate offers a dedicated pathway for candidates outside the UK to achieve the Certificate in Insurance and Financial Services (non-UK). It is ideal for those who provide financial advice, act as an insurance agent, or aspire to either of these roles.

In successfully completing three units you will gain valuable knowledge relevant to your role and qualify for the Certificate.

Completion requirements

The Certificate comprises three core units. You must select three units from the following options: AWF, HFE or AWB (only one), W01 or WH1 (not both), AWP or W04.

These can then be used towards further CII qualifications.

(AWF) Award in Financial Planning (non-UK)
15 credits

OR

(AWB) Award in Bancassurance (non-UK)
15 credits

OR

HFE Award in Financial Planning (Hong Kong)
15 credits

(W01) Award in General Insurance (non-UK)
15 credits

OR

(WH1) Award in General Insurance (Hong Kong)
15 credits

(AWP) Award in Investment Planning (non-UK)
10 credits

(W04) Award in Customer Service in Insurance (non-UK)
15 credits

Core

See pages 18-19 and 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-ins-fs

Award in London Market Insurance

3
RQF level

N/A
Member designation

40-60 hrs
Recommended study time per unit

Overview

The Level 3 Award is a specialist qualification for those working in or with the London Market. It helps you gain a broad understanding of the insurance process and practice across the London Market.

Designed in consultation with London Market practitioners, the Award in London Market Insurance provides an essential grounding for new entrants to the profession, or those who have dealings with it.

FCA appropriate qualification

The Award in London Market Insurance is recognised by the FCA as an appropriate qualification for the regulated activity of advising on syndicate participation at Lloyd's.

Completion requirements

The Award comprises two core units. These can then be used towards further CII qualifications.

(LM1) London Market Insurance Essentials
10 credits

(LM2) London Market Insurance Principles and Practices
15 credits

Core

See pages 18-19 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/ALMI

Certificate in London Market Insurance

3
RQF level

Cert CII
(London Market)
Member designation

40-60 hrs
Recommended study time per unit

Overview

Building on introductory knowledge gained from the Award in London Market Insurance, the Level 3 Certificate in London Market Insurance requires one further unit: London Market Underwriting Principles, (LM3).

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

It is a specialised qualification for those working in or conducting business through the London Market. It is particularly suitable for employees of Lloyd's syndicates, brokers, managing agents or members' agents in administrative, operational or other support roles, for example, business development managers, underwriting technicians or business analysts.

Completion requirements

The Certificate comprises three core units. These can then be used towards further CII qualifications.

(LM1) London Market Insurance Essentials
10 credits

(LM2) London Market Insurance Principles and Practices
15 credits

(LM3) London Market Underwriting Principles
15 credits

Core

See pages 18-19 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-lmi

Certificate in Insurance

3
RQF level

Cert CII
Member designation

40-60 hrs
Recommended study time per unit

Overview

The Level 3 Certificate in Insurance is a core qualification for insurance staff working across all sectors of the industry. It provides a fundamental grounding of the key insurance principles, disciplines, products and markets, including the regulatory environment, key disciplines of underwriting and claims, in addition to popular products such as motor, household, healthcare and packaged commercial insurances.

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

Completion requirements

The Certificate requires a minimum of 40 CII credits for successful completion. For the Certificate, candidates must study one core unit: IF1 or both LM1 and LM2. It is recommended that non-UK candidates study W01 as their core unit.

(IF1) Insurance, Legal and Regulatory
15 credits

OR

Award in London Market Insurance route:
(LM1) London Market Insurance Essentials
10 credits
AND
(LM2) London Market Insurance Principles and Practices
15 credits

OR

(W01) Award in General Insurance (non-UK)
15 credits

Core

Candidates can complete the qualification from any units within the insurance qualifications framework. However, please note the following restrictions:

- Due to the extent of syllabus overlap between IF1, LM1 and W01, achieving more than one of these units will receive only one award of credits.
- If you choose LM1 + LM2 as your core unit, studying LM3 to satisfy the remaining credit requirement will achieve the Certificate in London Market Insurance, instead of the Certificate in Insurance.

We recommend that you sit the required core unit(s) first as these provide foundation knowledge upon which the others build. The Certificate can be used towards further CII qualifications.

See pages 18-19 for individual unit assessment method.

International pathway
For learners outside of the UK we recommend the following pathway*:
W01 + two units from the following: WUE, WCE, W04

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months

*Some translated variants are available – please see unit page for details. These units are not available in the UK. Please refer to the relevant unit page for more information on the enrolment duration.

Find out more and enrol here:

cii.co.uk/cert-insurance



Diploma in Insurance

4
RQF level

DipCII
Member designation

80-120 hrs
Recommended study time per unit

Overview

The Level 4 Diploma in Insurance is a technical and supervisory qualification appropriate for insurance staff working across all sectors of the profession. It provides a firm understanding of insurance fundamentals and develops advanced technical knowledge.

We recommend that candidates complete the Certificate in Insurance or equivalent, prior to studying for the Diploma.

Completion requirements

The Diploma requires a minimum of 120 CII credits for successful completion, with at least 90 credits at Diploma level or above. Candidates must study unit M05, along with either M92 or 530. Further units at Diploma level or above also must be achieved to meet the requirement for full qualification completion. These remaining completion can come from any other units within the insurance qualifications framework.

(M05) Insurance Law 25 credits	AND	**(M92) Insurance Business and Finance** 25 credits	OR	**(530) Economics and Business** 30 credits

Core

To see which units are regarded as Diploma level, along with individual unit assessment methods, see pages 18-19. The Diploma can be used towards further CII qualifications.

Each mixed assessment unit enrolment is valid for 18 months and includes:

- Study text – digital only or printed and digital (including syllabus-year update in digital format), with exam guide and specimen coursework assignment delivered via RevisionMate
- Assessment entry (exam and coursework)

Each coursework unit enrolment is valid for 12 months and includes:

- Study text – digital only or printed and digital (including syllabus-year update in digital format), with specimen coursework assignment delivered via RevisionMate
- Assessment entry (coursework)

Find out more and enrol here:
cii.co.uk/dip-insurance



Advanced Diploma in Insurance

6
RQF level

ACII
Member designation

120-180 hrs
Recommended study time per unit

Overview

The Level 6 Advanced Diploma in Insurance provides you with an enhanced understanding of insurance practice, and is a comprehensive assessment of market knowledge and understanding. On completion, the Advanced Diploma demonstrates your advanced technical awareness and critical understanding of the sector to your colleagues, customers and regulators. Widely recognised, it stands as evidence of your commitment and ability, and can be your passport to a successful career. Members who hold the Advanced Diploma in Insurance and have at least five years' sector experience are eligible to apply for Chartered status.

We recommend you complete the Diploma in Insurance or equivalent, prior to studying for the Advanced Diploma.

Completion requirements

The Advanced Diploma requires a minimum of 290 CII credits for successful completion, with at least 150 at Advanced Diploma level, and a further 55 at Diploma level or above. The remaining 85 credits can come from any units within the insurance framework. Contributing towards successful completion, candidates must study unit M05, one unit from M92 or 530, and one unit from 820, 930 or 960:

(M05) Insurance Law
25 credits

(M92) Insurance Business and Finance
25 credits

OR

(530) Economics and Business
30 credits

(820) Advanced Claims
30 credits

OR

(930) Advanced Insurance Broking
30 credits

OR

(960) Advanced Underwriting
30 credits

Core

To complete, candidates can choose from any units within the insurance qualifications framework. To see which units are regarded as Advanced Diploma, or Diploma level, along with individual unit assessment methods, see pages 18-19.

Each mixed assessment unit enrolment is valid for 18 months and includes:

- Study text – digital only or printed and digital (including syllabus-year update in digital format), with exam guide and specimen coursework assignment delivered via RevisionMate
- Assessment entry (exam and coursework)

Each coursework unit enrolment is valid for 12 months and includes:

- Study text – digital only or printed and digital (including syllabus-year update in digital format), with specimen coursework assignment delivered via RevisionMate
- Assessment entry (coursework)

Find out more and enrol here:
cii.co.uk/adip-insurance

Demonstrate your advanced technical awareness and critical understanding of the sector to your customers, colleagues and regulators



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Personal Finance units

This is the framework for our personal finance qualification units.
They are grouped according to their difficulty, from level 2 through to level 6.
Depending on the qualification you want to achieve, you'll need to study a number of these units. Some of our qualifications require just one unit, while others require several.

RQF level: 2
CII credit level: Award

(LF1) Life and Pensions Foundations
0 credits
40 study hours

RQF level: 3 equivalent
CII credit level: Certificate

Not available in the UK

The following units are not registered as part of the UK's Regulated Qualifications Framework (RQF).

(AWB) Award in Bancassurance (non-UK)
15 credits
60 study hours

(AWF) Award in Financial Planning (non-UK)
15 credits
60 study hours

(HFE) Award in Financial Planning (Hong Kong) [1]
15 credits
60 study hours

(AWP) Award in Investment Planning (non-UK)
10 credits
60 study hours

RQF level: 3
CII credit level: Certificate

(CF1) UK Financial Services, Regulation and Ethics [2]
15 credits
60 study hours

(CF6) Mortgage Advice [2]
20 credits
100 study hours

(CF8) Long Term Care Insurance [2]
15 credits
70 study hours

(ER1) Equity Release [2]
15 credits
70 study hours

(FA1) Life Office Administration [2]
10 credits
60 study hours

(FA2) Pensions Administration [2]
10 credits
60 study hours

(FA5) Individual Savings Account Administration [2]
10 credits
70 study hours

(GR1) Group Risk
10 credits
50 study hours

(LP1) Life and Pensions Customer Operations [2]
15 credits
60 study hours

(LP2) Financial Services Products and Solutions [2]
20 credits
100 study hours

(LP3) Life and Pensions Principles and Practices [2]
10 credits
50 study hours

(R05) Financial Protection [2]
10 credits
50 study hours

RQF level: 4
CII credit level: Diploma

(J02) Trusts
20 credits
100 study hours

(J05) Pension Income Options
20 credits
100 study hours

(J07) Supervision in a Regulated Environment
20 credits
100 study hours

(R06) Financial Planning Practice [2]
30 credits
100 study hours

(J09) Paraplanning
30 credits
100 study hours

(J10) Discretionary Investment Management [2]
20 credits
80 study hours

(J12) Securities Advice and Dealing [2]
20 credits
70 study hours

(R01) Financial Services, Regulation and Ethics [2]
20 credits
60 study hours

(R02) Investment Principles and Risk [2]
20 credits
60 study hours

(R03) Personal Taxation [2]
10 credits
50 study hours

(R04) Pensions and Retirement Planning [2]
10 credits
50 study hours

(R07) Advanced Mortgage Advice
15 credits
70 study hours

RQF level: 6
CII credit level: Advanced Diploma

(AF4) Investment Planning
30 credits
150 study hours

(AF6) Senior Management and Supervision
30 credits
150 study hours

(AF8) Retirement Income Planning
30 credits
150 study hours

(AF1) Personal Tax and Trust Planning
30 credits
150 study hours

(AF5) Financial Planning Process
30 credits
150 study hours

(AF7) Pension Transfers [2]
20 credits
100 study hours

Notes

1. Unit HFE is also available in Traditional Chinese (HFT).
2. The FCA has listed these units as meeting appropriate qualification requirements for specific regulated activities (typically as part of a qualification). Please note, previous versions of CII units and qualifications may be listed as meeting requirements and other FCA requirements may apply for these activities.

Study and assessment key

Assessment methods vary depending on the unit's level and subject matter. Each unit within the framework has been assigned an icon to identify the assessment method from the options below.

Multiple choice question (MCQ) exam
Enrolment is valid for 12 months from the date of enrolment. MCQ exams can be sat at UK and international online exam centres, subject to availability, or via remote invigilation.

Paper-based written exam
Enrolment is valid for 12 months from the date of enrolment. Exams are delivered on paper at test centres.

On-screen written/typed exams
Enrolment is valid for 12 months from the date of enrolment. Exams are delivered on-screen/typed in test centres or remotely.

Coursework assignments
Enrolment is valid for 12 months from the date of enrolment. Candidates must pass three written assignments, each typically 2,000-3,000 words.

Award in Long Term Care Insurance

3
RQF level

N/A
Member designation

70 hrs
Recommended study time per unit

Overview

The Level 3 Award in Long Term Care Insurance develops knowledge and understanding of long-term care cover, including legal, taxation and regulatory issues and the responsibilities of local authorities.

FCA appropriate qualification

When held with the Diploma in Financial Planning or the Diploma in Regulated Financial Planning, the Award in Long Term Care Insurance meets the FCA's qualification requirements for advising on long-term care products and retirement advice.

Completion requirements

The Award comprises one core unit. On successful completion, this can be used towards further CII qualifications.

(CF8) Long Term Care Insurance
15 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-longtermcare

Award in Financial Planning (Hong Kong)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

60 hrs
Recommended study time per unit

Overview

The Award in Financial Planning (Hong Kong) provides knowledge and understanding of the financial planning process within a professional business environment and the core financial and life assurance products suitable to a client's needs.

The Award is suitable for those at the start of their career or anyone working in financial planning seeking to build their knowledge and understanding of financial planning in Hong Kong. This qualification can only be awarded to non-UK residents.

Also available in Traditional Chinese, (HFT).

Completion requirements

The Award comprises one core unit. On successful completion, this can be used towards further CII qualifications.

(HFE) Award in Financial Planning (Hong Kong)
15 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-fp-hk

Award in Financial Planning (non-UK)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

60 hrs
Recommended study time per unit

Overview

The Award in Financial Planning (non-UK) provides foundation knowledge in the core financial and life assurance products. You will also learn what constitutes professional practice, providing you with a framework for ethical behaviour.

The Award is suitable for anyone working outside the UK in the insurance and financial services sector. This qualification can only be awarded to non-UK residents.

Completion requirements

The Award comprises one core unit. On successful completion, this can be used towards further CII qualifications.

(AWF) Award in Financial Planning (non-UK)
15 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-financial-planning

Award in Bancassurance (non-UK)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

60 hrs
Recommended study time per unit

Overview

Designed for financial advisers and insurance agents working outside the UK in the banking sector, the Award in Bancassurance (non-UK) provides foundation knowledge in core financial, life assurance and insurance products. You will also learn what constitutes professional practice, providing you with a framework for ethical behaviour.

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

Completion requirements

The Award comprises one core unit. On successful completion, this can be used towards further CII qualifications.

(AWB) Award in Bancassurance (non-UK)
15 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-bancassurance

Certificate in Insurance and Financial Services (non-UK)

N/A
RQF level (equivalent to level 3)

Cert CII
Member designation

50-60 hrs
Recommended study time per unit

Overview

The Certificate offers a dedicated pathway for candidates outside the UK to achieve the Certificate in Insurance and Financial Services (non-UK). It is ideal for those who provide financial advice, act as an insurance agent, or aspire to either of these roles.

In completing the Certificate you will gain a solid base of knowledge relevant to your role.

Completion requirements

The Certificate comprises three core units. You must select three units from the following options: AWF, HFE or AWB (only one), W01 or WH1 (not both), AWP or W04. The Certificate can be used towards further CII qualifications.

Core

- **(AWF) Award in Financial Planning (non-UK)** 15 credits
  - OR **(AWB) Award in Bancassurance (non-UK)** 15 credits
    - OR **HFE Award in Financial Planning (Hong Kong)** 15 credits
- **(W01) Award in General Insurance (non-UK)** 15 credits
  - OR **(WH1) Award in General Insurance (Hong Kong)** 15 credits
- **(AWP) Award in Investment Planning (non-UK)** 10 credits
- **(W04) Award in Customer Service in Insurance (non-UK)** 15 credits

See pages 18-19 and 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-ins-fs



Certificate in Paraplanning

4
RQF level

CertPFS
(Paraplanning)
Member designation

50-100 hrs
Recommended study time per unit

Overview

The Level 4 Certificate in Paraplanning meets the specific needs of paraplanners, or those aspiring to the role. It offers a dedicated qualification route, developing paraplanning skills, expertise and advanced technical knowledge in several key advisory areas. It develops core technical knowledge in a number of key advisory areas, and helps you gain specialist report writing skills that improve your ability to provide sound professional advice.

It is ideal for senior and mid-level paraplanners looking to further their knowledge or those aspiring to the role, including new entrants, graduates and anyone looking for an entry route into financial planning.

Completion requirements

The Certificate comprises of four core units. The qualification can then be used towards further CII qualifications.

(CF1) UK Financial Services, Regulation and Ethics
15 credits

OR

(R01) Financial Services, Regulation and Ethics
20 credits

(R02) Investment Principles and Risk
20 credits

(R03) Personal Taxation
10 credits

(J09) Paraplanning
30 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate (no exam guide for J09)
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months for CF1, R01, R02 and R03)
- Exemplar coursework assignment for J09

Find out more and enrol here:
cii.co.uk/cert-paraplanning

Diploma in Regulated Financial Planning

4
RQF level

DipPFS
Member designation

50-60 hrs
Recommended study time per unit

Overview

The Level 4 Diploma in Regulated Financial Planning helps develop core technical knowledge and initial financial planning capabilities. The Diploma is appropriate for paraplanners, technical consultants and those in financial planning support roles. It is particularly suitable for anyone seeking to give retail investment advice as it provides both an industry entry qualification and a great starting point for ongoing development within financial planning.

FCA appropriate qualification

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

Completion requirements

The Diploma comprises of six core units. This qualification can then be used towards further CII qualifications.

(R01) Financial Services, Regulation and Ethics
20 credits

(R02) Investment Principles and Risk
20 credits

(R03) Personal Taxation
10 credits

(R04) Pensions and Retirement Planning
10 credits

(R05) Financial Protection
10 credits

(R06) Financial Planning Practice
30 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

R06 Video Revision
A separate video revision course can be purchased based on the specific case studies released for each exam sitting. Find out more **here**.

Find out more and enrol here:
cii.co.uk/dip-rfp

Diploma in Financial Planning

4
RQF level

DipPFS
Member designation

50-100 hrs
Recommended study time per unit

Overview

The Level 4 Diploma in Financial Planning develops core technical understanding across a broad range of key financial planning areas. The Diploma is suitable for paraplanners and technical consultants, and those in roles supporting financial planning processes.

To complete the Diploma in Financial Planning you must already hold one of the following CII qualifications, or equivalent: Certificate in Financial Services, Certificate in Regulated Financial Services Operations, or the withdrawn Certificate in Financial Planning.

Completion requirements

A minimum of 140 CII credits must be obtained for successful completion. The Diploma in Financial Planning comprises option units from across the Personal Finance qualifications framework. The Diploma can be used towards further CII qualifications.

To complete the qualification, units must be completed at Diploma level; this includes the seven units listed below and units R01-R04 and R06 from the Diploma in Regulated Financial Planning. One Advanced Diploma in Financial Planning unit can count towards this requirement. You must pass at least one CII Diploma unit (J02, J05, J07, J09, J10, J12, R01-R04, R06-R07) by multiple choice question exam, written exam, or coursework.

The remaining completion can come from any units within the Personal Finance qualifications framework, subject to a maximum of 1 Advanced Diploma unit.

See pages 38-39 to discover which units are at Advanced Diploma level.

(J02) Trusts
20 credits

(J05) Pension Income Options
20 credits

(J07) Supervision in a Regulated Environment
20 credits

(J09) Paraplanning
30 credits

(J10) Discretionary Investment Management
20 credits

(J12) Securities Advice and Dealing
20 credits

(R07) Advanced Mortgage Advice
15 credits

Option units

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate (no exam guide for J09)
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)
- Exemplar coursework assignment for J09

Find out more and enrol here:
cii.co.uk/dip-financialplanning

Understand the various investment products available in the marketplace to meet the unique needs of every individual

Award in Regulated Pension Transfer Advice

6
RQF level

N/A
Member designation

100 hrs
Recommended study time per unit

Overview

The Level 6 Award in Regulated Pension Transfer Advice develops the in-depth knowledge and practical skills needed by anyone seeking to advise on the transfer of safeguarded benefits, an increasingly important part of the advice process following the UK Government's pension reforms.

The Award is suitable for retail investment advisers seeking to undertake pension transfer work and become pension transfer specialists. It is ideal for retail investment advisers, paraplanners, technical consultants and those in financial planning support roles wanting to update their knowledge in this area.

FCA appropriate qualification

The Award in Regulated Pension Transfer Advice, when combined with an RDR-compliant qualification for retail investment advice, satisfies the appropriate FCA qualification requirements for those wanting to undertake pension transfer activities. This will enable you to meet the qualification requirements to practise in this area and expand your areas of expertise in your professional practice.

Please check our qualification webpage and the FCA Handbook and publications for details of CII qualifications and FCA requirements. We offer further advice on legacy qualifications and the new rules here: **ciigroup.org/en/learning/qualifications/pension-transfers-specialist**

Completion requirements

The Award comprises one core unit. The Award can be used towards further CII qualifications.

(AF7) Pension Transfers
20 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-in-regulated-pension-transfer-qualification



Advanced Diploma in Financial Planning

6
RQF level

APFS
Member designation

100-150 hrs
Recommended study time per unit

Overview

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

To complete the Advanced Diploma, you must already hold one of the following CII qualifications: Diploma in Regulated Financial Planning, Diploma in Financial Planning.

Members who hold the Advanced Diploma in Financial Planning and have at least five years' sector experience are eligible to apply for Chartered status.

Completion requirements

The Advanced Diploma comprises one core unit and several option units from across the Personal Finance qualifications framework.

A minimum of 290 CII credits must be obtained for successful completion. At least 120 credits must come from the Advanced Diploma units listed below, AF5 being a compulsory unit. A further 40 credits must be at Diploma level or above. The remaining credits can come from any units across the Personal Finance qualifications framework.

See pages 38-39 to discover which units are at Advanced Diploma and Diploma levels.

(AF5) Financial Planning Process
30 credits

Core

(AF1) Personal Tax and Trust planning
30 credits

(AF4) Investment Planning
30 credits

(AF6) Senior Management and Supervision
30 credits

(AF7) Pension Transfers
20 credits

(AF8) Retirement Income Planning
30 credits

Option units

Each written exam unit enrolment is valid for 12 months and includes:

- Digital study text/case study workbook (including syllabus-year update in digital format) and exam guide delivered via RevisionMate (excluding AF5)
- Printed study text/case study workbook option available (excluding AF5)
- Assessment entry (exam voucher is valid for 18 months)

Each coursework unit enrolment is valid for 12 months and includes:

- Study text – digital only or printed and digital (including syllabus-year update in digital format)
- Coursework assignments, including exemplar

AF5 Video Revision
A separate video revision course can be purchased based on the specific fact-find released for each exam sitting. Find out more **here**.

Find out more and enrol here:
cii.co.uk/adip-financialplanning



Certificate in Investment Operations

3
RQF level

N/A
Member designation

60-70 hrs
Recommended study time per unit

Overview

The Level 3 Certificate in Investment Operations is an introductory qualification that helps you gain the essential knowledge and skills you'll need if you work with investments in an operational role. You'll develop a general understanding of financial services, and gain practical insight into the area of investment operations you choose.

It is ideal for candidates working in a range of administrative and operational roles, such as those working in collective investment scheme administration, individual saving account administration and investment client servicing.

FCA appropriate qualification

The Certificate in Investment Operations satisfies the FCA qualification requirements for overseers of certain investment operations functions.

Completion requirements

The Certificate comprises two core units to choose from (CF1 or R01) and FA5. The Certificate can be used towards further CII qualifications.

(CF1) UK Financial Services, Regulation and Ethics
15 credits

OR

(R01) Financial Services, Regulation and Ethics
20 credits

(FA5) Individual Savings Account Administration
10 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months

Find out more and enrol here:
cii.co.uk/cert-investmentoperations

Award in Investment Planning (non-UK)

N/A
RQF level (equivalent to level 3)

CII (Award)
Member designation

60 hrs
Recommended study time per unit

Overview

The Award in Investment Planning (non-UK) helps you to develop and demonstrate your knowledge of investment products. You'll learn what constitutes professional practice and ethical behaviour.

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

This qualification can only be awarded to non-UK residents.

Completion requirements

The Award comprises one core unit. The Award can be used towards further CII qualifications.

(AWP) Award in Investment Planning (non-UK)
10 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Assessment entry (exam voucher valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-investment-planning

Certificate in Securities Advice and Dealing

4
RQF level

CertPFS
(Securities)
Member designation

50-70 hrs
Recommended study time per unit

Overview

The Level 4 Certificate in Securities Advice and Dealing will help you develop in-depth knowledge of investments and securities products, the UK taxation system and considerations for appropriate investment recommendations.

It is ideal for anyone seeking to advise or deal in securities and anyone working in related support roles looking to develop knowledge of the market.

FCA appropriate qualification

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

Completion requirements

The Certificate comprises four core units. The Certificate can be used towards further CII qualifications.

(R01) Financial Services, Regulation and Ethics
20 credits

(R02) Investment Principles and Risk
20 credits

(R03) Personal Taxation
10 credits

(J12) Security Advice and Dealing
20 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months

Find out more and enrol here:

cii.co.uk/cert-securities



Certificate in Discretionary Investment Management

4
RQF level

CertPFS (DM)
Member designation

60-80 hrs
Recommended study time per unit

Overview

The Level 4 Certificate in Discretionary Investment Management develops the wealth strategy and portfolio management skills required for effective discretionary investment management.

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

FCA appropriate qualification

The Certificate in Discretionary Investment Management satisfies the FCA's qualification requirements for this class of business.

Completion requirements

The Certificate comprises two core units. The Certificate can be used towards further CII qualifications.

(J10) Discretionary Investment Management
20 credits

(R01) Financial Services, Regulation and Ethics
20 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-investmentmanagement

Award in Life and Pensions Foundations

2
RQF level

N/A
Member designation

40 hrs
Recommended study time per unit

Overview

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

The Award is particularly suitable if you are new to the sector, or wish to demonstrate and enhance your knowledge. It's equally relevant for those in associated professions or support roles requiring an introduction to life and pensions.

Completion requirements

The Award comprises one core unit.

(LF1) Life and Pensions Foundations
0 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-lpf

Award in Financial Administration

3
RQF level

N/A
Member designation

60 hrs
Recommended study time per unit

Overview

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

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

It is suitable for anyone working in administrative and operational life or pensions roles, or anyone moving in to an administrative overseer role who needs to comply with FCA appropriate qualification requirements.

FCA appropriate qualification

Units in this qualification meet the FCA's appropriate qualification requirements for the oversight of specific administrative functions depending on option units chosen: CF1 (or R01) + FA1 (for life policies); CF1 (or R01) + FA2 (for stakeholder pension schemes).

Completion requirements

The Award comprises two core units to choose from (CF1 or R01) and one optional unit to choose from (FA1 or FA2). The Award can be used towards further CII qualifications.

Core

(CF1) UK Financial Services, Regulation and Ethics 15 credits	OR	**(R01) Financial Services, Regulation and Ethics** 20 credits

Option units

(FA1) Life Office Administration 10 credits	OR	**(FA2) Pensions Administration** 10 credits

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/award-financialadministration

Certificate in Regulated Financial Services Operations

3
RQF level

Cert CII (FS)
Member designation

60-70 hrs
Recommended study time per unit

Overview

The Level 3 Certificate in Regulated Financial Services Operations develops fundamental knowledge of the financial services sector, including regulation, legislation, and overseeing and administering financial products.

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

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

FCA appropriate qualification

Units in this qualification meet the FCA's appropriate qualification requirements for specific regulated activities depending on option units chosen. Please see the Certificate in Investment Operations and the Award in Financial Administration for details.

Completion requirements

The Certificate comprises one core unit out of a choice of two (CF1 or R01), and two optional units out of a choice of three (FA1, FA2 or FA5). The Certificate can be used towards further CII qualifications.

Core

(CF1) UK Financial Services, Regulation and Ethics 15 credits	OR	**(R01) Financial Services, Regulation and Ethics** 20 credits

Option units

(FA1) Life Office Administration 10 credits	**(FA2) Pensions Administration** 10 credits	**(FA5) Individual Savings Account Administration** 10 credits

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-rfso

Certificate in Financial Services

3
RQF level

Cert CII
(Life and Pensions)
Member designation
(Life & Pensions route)

Cert CII
(FS)
Member designation
(General route)

50-100 hrs
Recommended study time per unit

Overview

The Level 3 Certificate in Financial Services offers a choice of two learning routes, ideal for those in operational or technical support roles within financial services.

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

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

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

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

Completion requirements

The **life and pensions** route comprises three core units. The Certificate can be used towards further CII qualifications.

- **(LP1) Life and Pensions Customer Operations** – 15 credits
- **(LP2) Financial Services Products and Solutions** – 20 credits
- **(LP3) Life and Pensions Principles and Practices** – 10 credits

Core

The **general route** comprises two core units from a choice of three. The Certificate can be used towards further CII qualifications.

- **(CF1) UK Financial Services, Regulation and Ethics** – 15 credits
  OR
- **(R01) Financial Services, Regulation and Ethics** – 20 credits
- **(LP2) Financial Services Products and Solutions** – 20 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-financialservices

Consider the financial products and services consumers require at different stages of their lives and how solutions can be developed to satisfy their needs

Certificate in Mortgage Advice

3
RQF level

Cert CII (MP)
Member designation

60-100 hrs
Recommended study time per unit

Overview

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

FCA appropriate qualification

Completion of the Certificate in Mortgage Advice meets the FCA's qualification requirements for mortgage advisers.

Completion requirements

The Certificate comprises two core units to choose from (CF1 or R01) and CF6. The Certificate can be used towards further CII qualifications.

(CF1) UK Financial Services, Regulation and Ethics
15 credits

OR

(R01) Financial Services, Regulation and Ethics
20 credits

(CF6) Mortgage Advice
20 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-mortgageadvice

Certificate in Equity Release

3
RQF level

Cert CII
(MP & ER)
Member designation

60-100 hrs
Recommended study time per unit

Overview

The Level 3 Certificate in Equity Release develops advisory skills and offers an understanding of equity release regulation, products, market practice, and customer needs.

It is suitable for anyone seeking to give mortgage and equity release advice, such as advising on equity release products (both home reversion plans and lifetime mortgages). It is also ideal for anyone working in the mortgage and equity release market in non-advisory roles, for example, technical consultants or support roles.

FCA appropriate qualification

The Certificate in Equity Release meets the FCA's qualification requirements for mortgage advisers and those advising on equity release schemes.

Completion requirements

The Certificate comprises three core units to choose from (CF1 or R01), CF6 and ER1. The Certificate can be used towards further CII qualifications.

(CF1) UK Financial Services, Regulation and Ethics
15 credits

OR

(R01) Financial Services, Regulation and Ethics
20 credits

(CF6) Mortgage Advice
20 credits

(ER1) Equity Release
15 credits

Core

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-equityrelease

Certificate in Advanced Mortgage Advice

4
RQF level

Cert SMP
Member designation

60-100 hrs
Recommended study time per unit

Overview

The Level 4 Certificate in Advanced Mortgage Advice will bring you up to speed with recent changes to the mortgage process arising from the Mortgage Market Review.

It is an ideal next step for candidates who hold the Certificate in Mortgage Advice or the Certificate in Equity Release, requiring completion of just one more unit (R07).

FCA appropriate qualification

The Certificate in Advanced Mortgage Advice goes beyond the FCA's qualification requirements enabling mortgage advisers to continue developing their advice capabilities.

Completion requirements

The Certificate comprises three core units. The Certificate can be used towards further CII qualifications.

(CF6) Mortgage Advice	(R01) Financial Services, Regulation and Ethics	(R07) Advanced Mortgage Advice
20 credits	20 credits	15 credits
Core		

See pages 38-39 for individual unit assessment method.

Included in your 12-month enrolment:

- Digital study text (including syllabus-year update) and exam guide delivered via RevisionMate
- Printed study text option available
- Assessment entry (exam voucher is valid for 18 months)

Find out more and enrol here:
cii.co.uk/cert-ama





Develop your understanding and skills relating to climate change, climate risk and sustainable finance

Certificate in Climate Risk

Cert CRP
Member designation

130 hrs
Recommended study time per unit

Overview

Managing climate-related risks and supporting the transition to a low-carbon world are amongst our most significant global challenges. Central banks and financial regulators consider the identification, measurement and disclosure of these risks to be a priority. Recognising the strategic importance of this topic, the Certificate in Climate Risk is the first joint qualification from the Chartered Body Alliance, a joint initiative by the Chartered Insurance Institute (CII), the Chartered Banker Institute (CBI) and the Chartered Institute for Securities and Investment (CISI).

The aim of the Certificate is to develop the learner's professional knowledge, understanding and skills relating to climate change, climate risk and sustainable finance, with a view to supporting customers, clients, colleagues and communities with the transition to a sustainable, low-carbon world.

This single-unit qualification is designed for financial services risk professionals (or aspiring risk professionals) with an understanding of risk management principles and practices. The Certificate is ideal for those who wish to develop their knowledge of climate risk and demonstrate their expertise – wherever they are in the world. No previous knowledge of climate risk is required, but an understanding of risk management principles and financial services practices is assumed.

***Please note that the Certificate is delivered and awarded by the Chartered Banker Institute. As the Chartered Insurance Institute is not the awarding organisation for this qualification, candidates can apply (at no cost) for recognition of prior learning if they seek to use the 15 CII credits towards relevant CII qualifications.**

Completion requirements

The Certificate comprises one core unit: Principles and Practice of Climate Risk.

Principles and Practice of Climate Risk

Core

Included within your 12-month enrolment (all delivered by the CBI):

- Online study guide
- Interactive e-learning modules
- Assessment entry (first exam sitting)

While studying this qualification, you will become a member of two globally recognised Chartered professional bodies – the Chartered Insurance Institute and the Chartered Banker Institute.

Upon completion, candidates will be able to use the Chartered Banker Institute's designation 'Cert CRP' after being certified by the CBI.

Find out more and enrol here:
cii.co.uk/learning/qualifications/unit-CL1

Supporting your studies



Each unit enrolment comes with the essential tools to support your learning.

Study text

Typically available in digital and hard copy, the study text encourages structured self-study to help you master the syllabus. Chapters define learning outcomes and can include self-test questions. You will also receive electronic updates highlighting specific industry changes or technical amendments during your enrolment, as well as access to a host of online study support services through our RevisionMate study tool.

If a new edition of the study material is released during this period, you will automatically receive access to the material on RevisionMate and will be notified via email.

RevisionMate

RevisionMate is an online study support tool that helps you revise and access your digital content. Key features can include:

- **Digital study text**
- **Student discussion forum** – share common queries and learn with your peers.
- **Quiz questions** – check understanding of the study text as you progress.
- **Digital exam guide**

Exam guides and specimen coursework assignments

For multiple choice question exams, these comprise of a complete specimen exam with answers, highlighting syllabus areas covered and useful hints. For written exams they include past papers with examiners' comments on candidates' performance and key points for inclusion in your answers. Specimen coursework assignments are provided for units which offer mixed assessment or coursework assessment.

Current exam guides and specimen coursework assignments are supplied digitally and can be found on the unit webpage on the CII website and on RevisionMate.

Please note, we recommend you sit your exam during your qualification unit's enrolment period, as access to online support materials will end after your enrolment expires.

Enrolment Plus



Enrolment plus is designed to help you pass first time by giving you access to a wider range of study support.

Enrolment plus includes the following:

- Standard Enrolment – study text (all digital materials delivered via RevisionMate) and assessment entry.
- Additional revisions available for your unit, at a discounted price and so this option provides a significant cost-saving over buying the products separately. The revision aids are produced by industry experts and focus on key areas of the unit syllabus in an engaging and interactive way, ranging from self-test questions to online tutorials. More information on specific revision aids can be found on page 81.

Please note:

- Enrolment plus is available for selected Award/Certificate/Diploma units only. The relevant units are listed on the CII website: **cii.co.uk/enrolment-plus**
- Access to the study text and revision aids is available for 12 months from the date of enrolment. Please refer to the unit or revision aid page for more information.

Enrol with Enrolment plus for great savings on Key Facts Booklet, Audio Revision, Knowledge Checker and E-Learn revision aid prices!*

* Availability of each revision aid depends on the unit

Study with confidence



Revision aids

Our revision aids are designed to help you study effectively. Explore our range of resources below and find the ones which suit your study approach.

Key Facts Booklet

Available for selected Certificate and Diploma level units

Summarising the key information contained in the study text, a Key Facts Booklet is more portable than a study text and is perfect for just focusing on the high-level syllabus requirements. Available in digital and print formats.

Knowledge Checker

Available for selected units

Delivered online through RevisionMate, each Knowledge Checker contains between 150 and 300 questions (depending on the unit) and provides comprehensive, flexible and interactive self-testing of the unit study text. Question feedback is provided in the form of a chapter reference to the specific areas being covered in the official CII study text for the unit.

Knowledge Checkers are not past papers. While they are designed to check knowledge of the unit study text to assist with your learning, they are not a product of the same development process as the actual CII examination question bank and are not intended to be used as mock exam questions.

Revision Extra

Available for IF1-2 and R01-4

Delivered through RevisionMate, this video-based course covers the relevant topics from the syllabus, to help you prepare for your exam in a memorable way.

E-learn

Available for selected Certificate and Diploma level units

Delivered via RevisionMate, this online tutorial provides interactive study, backed by an assessment tool to check understanding as you progress with your studies. This is designed to complement, not replace, the primary study text. It provides visually engaging and therefore memorable learning. It covers key and difficult topics only, not the entire syllabus.

Audio Revision

Available for R01-R06, AF1 and AF4

MP3 audio material for R0 units covers the key elements of each subject. The AF options cover key Diploma learning points that underpin application at Advanced level, together with exam technique guidance. Delivered via RevisionMate, audio files are simple to download and are ideal for on-the-go study.

Video Revision

Available for R06 and AF5

Delivered through RevisionMate, these courses are based on the case studies/ fact-find released for specific exam sittings and cover the main areas of knowledge that might be applicable for the exam. These will be released over the two weeks prior to the exam.

Please refer to the relevant revision aid shop page for more information on the enrolment duration.

Find out more here:
cii.co.uk/revision-aids



Effective preparation for exam success

If you are looking for extra revision support, check out our popular online interactive revision courses on our website.

Individual Training

Designed to accelerate exam performance, revision courses are provided by highly experienced trainers qualified in the subject matter. Our trainers know how to deliver effective and productive online training sessions, ensuring all candidates are fully engaged to maximise their learning experience.

Revision courses offer you the extra support needed and can really make a difference!

Explore all our available revision courses via the link below, or conveniently complete the online booking form by scanning the QR code.

1. **Revision courses**
2. **Booking request form**

For individual training needs, get in touch by email to: **training@cii.co.uk**

Corporate Training

Revision courses are also available for employers to support employees with their qualifications.

The focus and support provided within a live virtual training course can really make a difference in passing an exam.

Our revision courses for businesses typically run over two days, offering candidates sufficient time to grasp the essential areas of an exam syllabus as a supplement to their own learning.

Depending on your needs, the duration and depth of these courses can be tailored for different audiences at different stages in their learning.

Through our network of expert trainers, we can also offer training for all our CII examination units. If you have any specific exam preparation needs, please get in touch.

For corporate orders and business enquiries about our revision courses, get in touch by email to: **business.enquiries@cii.co.uk**

For corporate training enquiries for MEA and CSA please contact **enquiries-me@cii.co.uk**

Find out more here:
cii.co.uk/learning/training/revision-courses

Qualification Training Programmes



The Chartered Insurance Institute offers online Training Programmes, delivered with live interactive tutor support over half day sessions, for anyone looking to achieve their Certificate or Diploma in Insurance, and Diploma or Advanced Diploma in Financial Planning.

Programme Objectives

The aim of the Qualification Training Programme is to provide support and to aid understanding of the subject matter for the associated units within the qualification pathway. The training sessions are designed to help you develop exam technique and knowledge to be confidently prepared for the exams and successful in achieving your qualification.

By participating in a CII Qualification Training Programme, you will be able to:

- Describe the main principles within the framework.
- Identify the right techniques to use in the CII examinations.
- Apply the knowledge gained.

What will you gain by attending the Training Programme?

You will be supported by a blend of live and digital training during the programme, accessible via the RevisionMate platform.

The programme includes:

- Live tutor support; half-day interactive training sessions.
- Tutor support provided via email throughout the programme.
- Access to recordings of each live training session.
- Additional study materials provided by your trainer: quizzes and exam style questions.
- Exam Guides.
- Support with study planning, study tips and exam hints.

Visit our website to view all our available qualification training courses. For more information, please email: **training@cii.co.uk**

For corporate training solutions, please email: **Business.Enquiries@cii.co.uk**

For corporate training enquiries for MEA and CSA please contact **enquiries-me@cii.co.uk**

Find out more here:

cii.co.uk/learning/training/cii-qualifications-training-programme

A sign of your achievement



Membership designations demonstrate your professional achievements and your commitment to high ethical standards and continuing professional development.

Obtaining a Chartered Insurance Institute or Personal Finance Society member designation is a sign of your achievement.

Reflecting our full qualifications framework, the member designations listed opposite are available at Award, Certificate, Diploma and Advanced Diploma level.

Stand out from the crowd.

Members can use their designation to promote their achievements and gain recognition from employers and peers.

Visit our website for details about using member designations and titles.

cii.co.uk/using-cii-designations-and-titles

Member designations

Designations by level	Designation	Qualification/Programme held by members
Fellowship	FCII	CII Fellowship
	FPFS	PFS Fellowship
Advanced Diploma	ACII	Advanced Diploma in Insurance
	APFS	Advanced Diploma in Financial Planning
Diploma	DipCII (Claims)	Diploma in Insurance, including units: M85 or 820
	DipCII	Diploma in Insurance
	DipPFS	Diploma in Regulated Financial Planning or the Diploma in Financial Planning
Certificate	Cert CII	Certificate in Insurance, Certificate in Insurance and Financial Services (non-UK)
	Cert CII (Claims)	Certificate in Insurance, including one of the following units: IF4, M85 or 820
	Cert CII (Life and Pensions)	Certificate in Financial Services via the life and pensions route
	Cert CII (London Market)	Certificate in London Market Insurance; or Certificate in Insurance, by a route including the Award in London Market Insurance
	Cert CII (Health and Protection)	Certificate in Insurance, including at least two of the following units: IF7, R05, GR1
	Cert CII (Protection)	Certificate in Insurance, including units R05 and IF9
	Cert CII (Insurance Broking)	Certificate in Insurance, including one of the following units: I10, M81, 930
	Cert CII (Customer Service)	Certificate in Insurance, including unit IF9
	Cert SMP	Members of the Society of Mortgage Professionals holding the Certificate in Advanced Mortgage Advice
	Cert CII (MP)	Members of the Society of Mortgage Professionals holding the Certificate in Mortgage Advice
	Certs CII (MP & ER)	Members of the Society of Mortgage Professionals holding the Certificate in Equity Release
	Cert CII (FS)	Certificate in Regulated Financial Services Operations or Certificate in Financial Services via the general route
	CertPFS (Paraplanning)	Certificate in Paraplanning
	CertPFS (Securities)	Certificate in Securities Advice and Dealing
	CertPFS (DM)	Certificate in Discretionary Investment Management
Award	CII (Award)	Award in Bancassurance (non-UK)
		Award in Customer Service in Insurance (non-UK)
		Award in Financial Planning (non-UK)
		Award in General Insurance (non-UK)
		Award in Investment Planning (non-UK)
		Award in Financial Planning (Hong Kong)
		Award in General Insurance (Hong Kong)

Please see our website for details of member designations that can be used by members who have achieved qualifications or units that have been retired.

A commitment to professional standards



Chartered
Chartered Insurance Institute

Chartered status is the globally recognised badge of professionalism among employers, consumers and businesses. It demonstrates your commitment to putting customers first, upholding ethical standards, and maintaining your technical knowledge.

"It is very important to me that the financial planning industry becomes recognised as a leader in professionalism, integrity and trust. This is at the heart of everything I do and achieving Chartered status, in my eyes, is the benchmark that everyone in the industry should aspire to and also ensures that there is a framework in place for industry goals to be achieved."

Max Folland
Chartered Financial Planner

Accredited by your professional body
Chartered status is awarded to members of the Chartered Insurance Institute and Personal Finance Society who hold one of our Advanced Diplomas and have at least five years' experience within the insurance and/or personal finance professions.

Wearing the badge with pride
Attaining Chartered status is challenging and takes commitment. However, once you have achieved the accolade, you can proudly demonstrate your commitment by applying the Chartered logo to your stationery and personal communications.

For more information and to apply, visit:
cii.co.uk/chartered

Chartered Designations
Chartered Insurer
Chartered Insurance Practitioner
Chartered Insurance Broker
Chartered Insurance Risk Manager
Chartered Financial Planner
Chartered Insurance Underwriting Agent

A passion for professionalism



Fellowship status demonstrates to the world that you have attained and maintained the highest and most prestigious level of professional achievement. Holders of the Advanced Diploma who meet the full eligibility requirements have the opportunity to apply for Fellowship.

The Fellowship has been designed on the basis that each individual is in the best position to evaluate what development needs they have and how best to address these needs. You have control of the way you progress your own career while also working towards Fellowship. It gives you the ability to select a path to Fellowship which fits your own skills, interests and development needs.

FCII Programme

Completion requirements:

- Complete the Advanced Diploma/ Associateship
- Pass the Business Ethics programme
- Submit a Major achievement (four options available)
- Submit three years' Continuous Professional Development
- Write a statement of personal development.

Full details can be found online at:
cii.co.uk/membership/fellowship-programme

For further guidance and support prior to or during your FCII application, the Fellowship Advisory Service is on-hand.

To contact the Fellowship Advisory Service email: **societies.fas@cii.co.uk**

FPFS

Completion requirements:

- A total of 350 credits are required to complete the Fellowship
- This must include obtaining 290 credits through completion of the Advanced Diploma in Financial Planning
- The remaining 60 credits can come from a combination of:
  - passing additional CII personal finance qualification units
  - recognition of prior learning for non-CII regulated qualifications
  - applying for PFS Fellowship Recognition: membership credits which are obtained via non-regulated qualifications.

Full details can be found online at:
thepfs.org/membership/join-us/fellow

For further guidance and support contact our Customer Service team:

T: **+44 (0)20 8989 8464**

E: **customer.serv@cii.co.uk**

Your next steps



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

Explore the professional map and self-assess your current skills. Find out more: **ciigroup.org/professional-map/individuals/self-assess-your-skills/**

Become a member and discover how our community can support your learning journey. Find out more here: **cii.co.uk/membership/**

Get in touch:

Request a call back for assistance with selecting a qualification or a unit enrolment, email: **qualification.enquiries@cii.co.uk**

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

For corporate enquiries, please email us at **business.enquiries@cii.co.uk**

For corporate training enquiries for MEA and CSA please contact **enquiries-me@cii.co.uk**

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