

PRACTICAL FINANCIAL EXAMS

Practical Investment Planning

What is Practical Investment Planning?

Practical Investment Planning is a new financial planning qualification which examines the practical and soft skills involved in client interactions and in the synthesis of professional investment advice. It is assessed via a **written coursework assignment** and **portfolio of work-based evidence**, supported by a **professional discussion** with an Assessor.

It is designed for UK retail Financial Advisers and those in related support roles who have already completed their Level 4 Diploma and are seeking to develop their practical skills as an investment adviser.

What makes Practical Investment Planning different?

The role of the Financial Adviser has evolved dramatically over the last decade, and is now firmly one of **relationship management**, not technical. But, most investment planning qualifications have not kept up with the speed of the change, with many still examining old-fashioned, out of date theoretical equity and bond work as opposed to real life, modern-day investment planning.

However, Practical Investment Planning focuses much more on relationship management, and the **practical application** of relevant technical knowledge. As such, we believe that Practical Investment Planning is the perfect complement to your Level 4 Diploma.

Who should take Practical Investment Planning?

We believe that Practical Investment Planning is perfect for **trainee Financial Advisers**, and that it could be used by employers as an independent, recorded part of their training programme, to evidence Competent Adviser Status, and for their Fit and Proper assessment. Furthermore, it could be used to help prepare **Paraplanners** and **Senior Administrators** for a client-facing advisory role.

Business Development Managers and **Account Managers** working for product providers, investment managers, and life offices could benefit hugely by stepping into the shoes of a Financial Adviser, helping them to empathise and develop stronger long-term relationships with their Financial Adviser clients.

Experienced Financial Advisers and **Chartered Financial Planners** could use it to expand, develop, and hone their existing investment planning knowledge and skills to deliver a better customer journey for their retail clients. Furthermore, it provides up to 100 hours of high quality, independent, structured CPD.



Key Features

SCQF Level 9 Credit Rating by the Scottish Qualifications Authority to assure assessment quality and fitness for purpose

PFE(PIP) post-nominal designation upon completion, to help you stand out from the crowd as an investment planning specialist

100 hours total qualification time to complete over a 12-month enrolment period

Designed for **Financial Advisers** and those in **related support roles** already qualified at RQF Level 4/6

Premium quality, full-colour **study text** and unlimited access to a Trainer via our **E-mail Helpline**

Robust, comprehensive assessment via your personal coursework portfolio, supported by a professional discussion with an Assessor

£799 packaged price or mix and match your study support