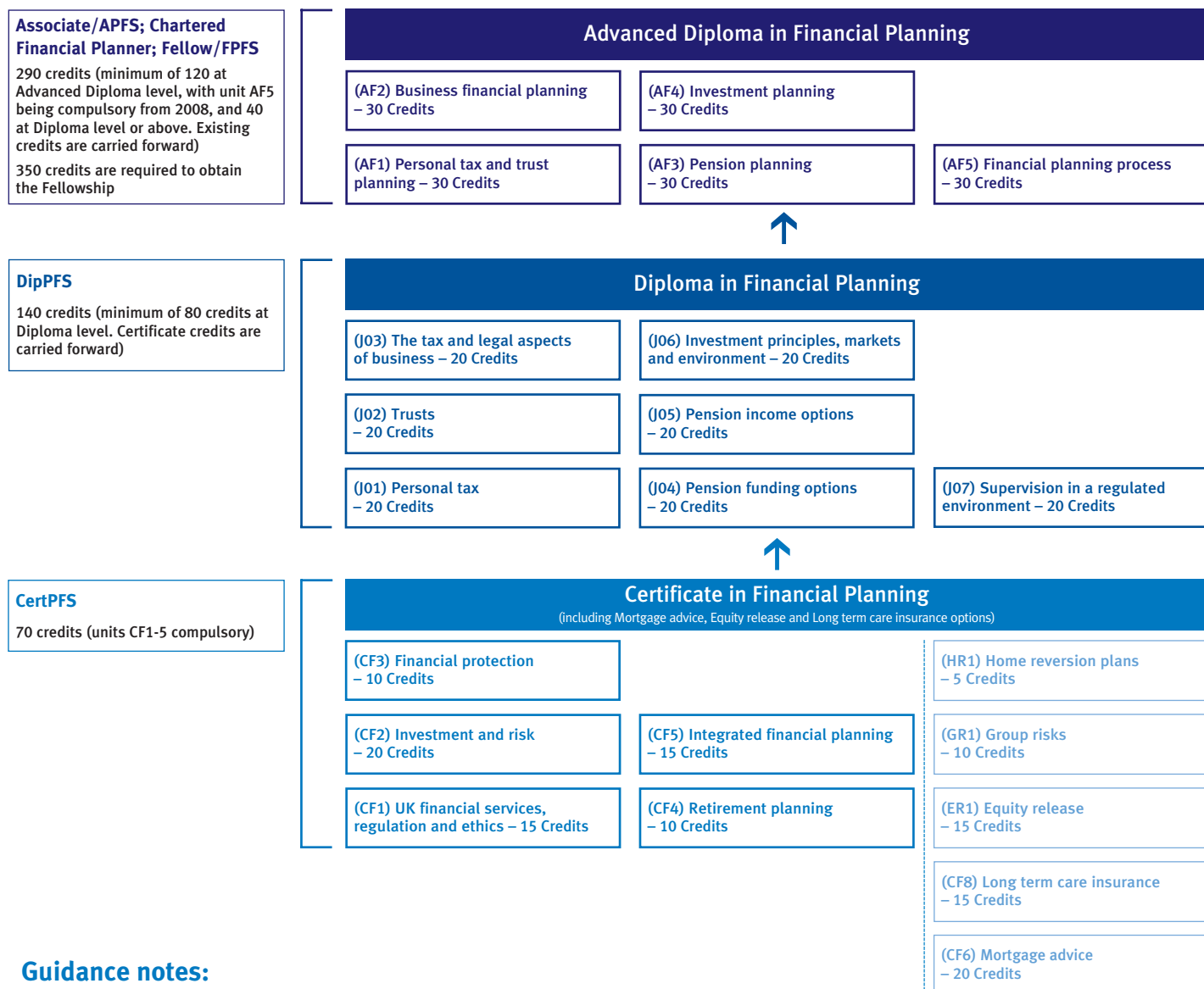


# At a glance route to Chartered Financial Planner

## Membership designation/title



## Guidance notes:

### Entry requirements

- There are no entry requirements for the Certificate in Financial Planning
- You may enter for any of the Diploma in Financial Planning units, without having first completed the Certificate in Financial Planning or equivalent (such as FPC, CeFA or Investment Advice Certificate). However, the Diploma in Financial Planning will only be awarded where the Certificate in Financial Planning (units CF1-CF5 inclusive), or equivalent, is held.
- To enter for the Advanced Diploma in Financial Planning candidates must hold, as a minimum, the Certificate in Financial Planning or equivalent. We do, however, recommend that candidates complete the Diploma before entering for the Advanced Diploma or alternatively study for them both simultaneously.

### Other credit awards

- Credits can also be obtained in respect of Certificate in Financial Administration units (FA1) Life office administration and (FA2) Pensions administration – 10 Certificate level credits are awarded in each case.
- Credits may also be available in respect of other exams passed under discontinued CII qualification routes or comparable exams offered by other awarding bodies.

### Use of designations/titles

Membership and Continuing Professional Development requirements apply to their use.

### Full terms and conditions

Full details on the Diploma and Advanced Diploma can be found at [www.cii.co.uk](http://www.cii.co.uk) within the section titled 'Financial Services'.

**Note: individual completion requirements apply to each qualification, determining the composition of credits that can be used in each instance**

Unit title	Credit level		
	Certificate	Diploma	Advanced
<b>Current</b>			
<b>Advanced Diploma in Financial Planning</b>			
Units: AF1 – AF5			30 per unit*
<b>Diploma in Financial Planning</b>			
Units: J01 – J07		20 per unit	
<b>Certificate in Financial Planning / Financial Administration</b>			
CF1 – UK financial services, regulation & ethics	15		
CF2 – Investment and risk	20	20**	
CF3 – Financial protection	10		
CF4 – Retirement planning	10		
CF5 – Integrated financial planning	15		
CF6 – Mortgage advice	20	20**	
CF8 – Long term care insurance	15	15**	
ER1 – Equity release	15		
FA1 – Life office administration	10		
FA2 – Pension administration	10		
GR1 – Group risks ***	10		
HR1 – Home reversion plans	5		
<b>Withdrawn</b>			
<b>Advanced Financial Planning Certificate</b>			
Units: G10, G20, G30, G60, G70, G80, H15, H25, F10, F20, F30, F40, F50, L10, L20, L30, L40, L50			30 per unit
K10 – Retirement options			20
K20 – Pension investment options			20
<b>Miscellaneous exams</b>			
MAQ – Mortgage advice qualification		20	
SV1 – Savings and investment		20	
<b>Certificate in Financial Planning</b>			
CF7 – Lifetime mortgage activities	15	15**	
CF9 – Pension simplification	10		
<b>Financial Planning Certificate</b>			
Completed (1994 scheme – including unit FP3)	50		
Completed (pre-1994 scheme – excluding unit FP3)	32		

\* Advanced Diploma in Insurance units: 555, 556, 735, 790, 945, CITIP each provide 30 advanced credits towards the Advanced Diploma in Financial Planning where passed **prior to 2008 and where candidates met the transitional rules of 2006.**

\*\* Credit value where exam passed **prior to 2007.**

\*\*\* To be launched in 2008.