



# Online study support at a glance



# Introduction

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RevisionMate is the CII's easy-to-use online study support tool, provided FREE with a study text enrolment.

It offers an unrivalled suite of online tools to support you through your studies and improve your chances of exam success.

RevisionMate is available for all units across the following qualifications:

## Financial Services

Certificate in Financial Administration

Certificate in Financial Planning

Diploma in Financial Planning

Diploma in Regulated Financial Planning

And selected Advanced Diploma in Financial Planning units

## General Insurance

Foundation Insurance Test (FIT)

Award in London Market Insurance

Certificate in Insurance

Diploma in Insurance

And selected Advanced Diploma in Insurance units



[Login to RevisionMate](#)

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# Study & revision tools

Once logged in, you'll find your unit enrolment(s) listed under 'My subjects'. By clicking on the unit title you'll reveal a range of tools tailored to your area of study.

Find out more by continuing to scroll through this document.



## MYSUBJECTS

- R01 Financial services, regulation and ethics
  - Getting started
  - Your study plan
  - **Chapters**
    - Chapter 1** The UK financial services industry, in its European and global context
    - Chapter 2** How the retail consumer is served by the financial services industry
    - Chapter 3** Legal concepts and considerations relevant to financial advice
    - Chapter 4** The regulation of financial services
    - Chapter 5** The Financial Services Authority Part 1: Its responsibilities and approach to regulation
    - Chapter 5** The Financial Services Authority Part 2: The FSA Handbook
    - Chapter 6** Principles and rules as set out in the regulatory framework
    - Chapter 7** The regulatory advice framework
    - Chapter 8** Client advising skills
    - Chapter 9** The FSA's use of principles and outcomes-based regulation to promote ethical and fair outcomes
    - Chapter 10** Ethics and professional standards
  - Prepare for your exam
  - Resource centre



# Study & revision tools

## Getting started

A good place to start, this section offers practical advice on how to get the most from RevisionMate and which features you should familiarise yourself with first.

The screenshot shows the RevisionMate website interface. At the top, the logo reads "REVISIONMATE supportingstudysuccess" with an icon of four people. The user is logged in as "Test User2". The main content area is titled "GETTING STARTED" and provides a list of key features and where to find them:

- Questions to test your study progress** – located in each of the 'Chapter' sections, under the heading 'Test'.(\*)
- Mock exam** – located in the 'Prepare for your exam' section, alongside essential information about your exam and additional study and revision tools.
- Customised study planner** – located in the 'Study planner' section (where you can also start or stop study planner reminder emails).
- Online copy of your study text** – located in the left hand column of your RevisionMate course, regardless of what section you are in.
- Discussion forums** – located in the right hand column of your homepage (you are not alone!).

Below this list, it states: "RevisionMate courses do contain extra tools, guides and content, but these vary from unit to unit: they include short audio 'extra helps', revision videos and other useful items such as calculations guides and 'English for insurance professionals' support. Look out for these features in the 'Chapters', 'Prepare for your exam' and 'Resource centre' sections."

At the bottom of the main content area, there are two steps:

- Step 1** - Create your study planner (you can choose to receive reminder emails to help keep you on track)
- Step 2** - Book your exam as soon as possible to ensure you secure your first choice date and

The right-hand sidebar contains sections for "Discussions" (listing various diplomas and certificates), "My Notes" (with a "Type a new note:" field and "Priority" and "Sort by" dropdowns), and a "QUESTION PACKS" promotion with the text "practice, perform, pass" and "Find out more and buy online".

# Study & revision tools

## Your study plan

Get organised by creating a bespoke study plan.

The plan targets study time where it's needed most by giving more hours to chapters that are linked to areas of the syllabus that attract the most marks.

Keep on track with emailed progress updates, and use the study calculator to work out when you'll be ready to sit the exam.

**REVISIONMATE**  
supportingstudysuccess

Home

RevisionMate » R01 0/1 » Studyplanner

**STUDYPLANNER** Print

Activity	Start date	Minimum hours required	Deadline	Progress	Remove
Chapter 1 - The UK financial services industry, in its European and global context	01 Jun 2011	3.6	02 Jun 2011	Not started	--
Chapter 2 - How the retail consumer is served by the financial services industry	02 Jun 2011	7.2	05 Jun 2011	Not started	--
Chapter 3 - Legal concepts and considerations relevant to financial advice	05 Jun 2011	5.4	07 Jun 2011	Not started	--
Chapter 4 - The regulation of financial services	07 Jun 2011	3.6	09 Jun 2011	Not started	--
Chapter 5 - The Financial Services Authority Part 1: Its responsibilities and approach to regulation	09 Jun 2011	8.4	12 Jun 2011	Not started	--
Chapter 5 - The Financial Services Authority Part 2: The FSA Handbook	12 Jun 2011	9.0	16 Jun 2011	Not started	--
Chapter 6 - Principles and rules as set out in the regulatory framework	16 Jun 2011	5.4	19 Jun 2011	Not started	--
Chapter 7 - The regulatory advice framework	19 Jun 2011	7.8	22 Jun 2011	Not started	--

**Study calculator**

Enter your exam date

You will have to study xx hours per week

Enter your weekly hours

You could book your exam for xx-xx-xxxx

**Recalibrate planner**

New exam date:

(Finished items will not be affected.)

Recalibrate

# Study & revision tools

## Chapters

Available for the majority of units, these correspond to each chapter in the study text and contain practical learning materials, including a summary of key points, case studies and a multiple choice knowledge check facility.

As you work through each chapter, update your status to keep track of progress. You'll also have access to an online copy of the study text, which can be conveniently viewed on screen and searched for keywords.

The screenshot displays the RevisionMate website interface. The top navigation bar includes the RevisionMate logo, a user profile icon, and the text "You are logged in as Test User2 (Logout)". The main content area is titled "MYSUBJECTS" and shows "Chapter 5 - The Financial Services Authority Part 2: The FSA Handbook". Under "Here you will find:", there are four bullet points: summary information, access to an online searchable reference copy, a test to check understanding, and an option to update progress status. Below this is a "Key Points" section with a paragraph of text. The "Threshold Conditions" section lists conditions for retaining Part IV permission. The "Senior Management Arrangements, Systems and Controls" section lists requirements for senior management, appointment of individuals, systems and controls, and whistleblowing procedures. The "General Provisions" section lists requirements regarding statutory status disclosure and referring to approval by the FSA. On the right, there are sections for "Discussions" and "My Notes". A "Your study text" box is also visible. A separate window shows a "R01 Mock Exam for exams up to 31 August 2011 - Attempt 1" with three multiple-choice questions.

# Study & revision tools

## Prepare for your exam

This section familiarises you with the exam format and tests your knowledge with either real or specimen exam questions, helping you identify any gaps in knowledge.

For Award, Certificate in Insurance and Diploma 'JO' units you'll also find downloadable audio clips giving useful advice on getting the most from your revision activity.

**REVISIONMATE**  
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Home      You are logged in as Test User2 (Logout)

RevisionMate » R01 0

My profile  
Help & FAQ's  
Contact us  
Feedback  
Updates

**PREPAREFORYOU EXAM**

In this section you'll find:

- a mock exam
- information to help you prepare for your R01 exam

**Mock exam**

Click on the 'Start' button below to launch your mock exam. Please note that the mock exam is delivered online and is timed as in the real exam but the software delivering the test is different. If you want to see what the screen/navigation is like in the real exam, try the 'CII online exams simulation'.

This mock test is comprised of specimen examination questions produced by the CII Examinations Department to assist students in their preparation for the examination. Ideally, you should have completed the majority of your studies before attempting the mock test. You should then review your performance to identify areas of weakness on which to concentrate the remainder.

You will get maximum benefit from it if you attempt it und

**R01 Mock Exam for exams up to 31 August 2011**

Passmark:	Time limit:	Number of
65%	120 minutes	100

**Audio**

We've included some non subject - specific audio revision tips to help you get started. Click on the links below to listen, or download the MP3 version.

- [RevisionMate Revision Tips \(listen online\)](#)
- [RevisionMate Revision Tips \(MP3 download\)](#)

**Study and exam information**

First things first – if you haven't already done so - get in the 'Resource centre'. Once you know your exam date help organise your study time.

**While you're studying...**

- Exam policies – [click here](#) for essential information you need to understand when making a CII exam booking.
- Regulatory changes – [click here](#) for the CII website page that lists the latest legislation and regulation

**Discussions**

- Advanced Diploma in Financial Planning
- Diploma in Regulated Financial Planning
- Diploma in Financial Planning
- Certificate in Financial Planning
- Advanced Diploma in Insurance
- Diploma in Insurance
- Certificate in Insurance
- Award in London Market Insurance

**My Notes**

(No notes to show)

Type a new note:

Priority: 1

Set by: Last update: A

# Study & revision tools

## Resource centre

Here we provide links to areas of the CII website and other external resources you may find useful. These include exam syllabuses, updates to the study text and online exam booking.

This section also provides a log of your chapter progress and the results of each multiple choice knowledge check.

**REVISIONMATE** supportingstudysuccess

Home You are logged in as Test User2 (Logout)

RevisionMate » R01 0/1 » Resource centre

**RESOURCECENTRE**

CII online exam simulation  
Dictionary of Finance  
Updates to Study Text  
Updates to Exam  
R01 Syllabus

Book your Exam  
More Information about your exam unit  
Tax tables  
RDR Implementation - our solutions and how we can help

Progress reporting

Activity	Score	Status
Chapter 1 - The UK financial services industry, in its European and global context	-	Not started
Chapter 1 - Test	-	Completed
Chapter 2 - How the retail consumer is served by the financial services industry	-	Not started
Chapter 2 - Test	-	Completed
Chapter 3 - Legal concepts and considerations relevant to financial advice	-	Not started
Chapter 3 - Test	-	Completed
Chapter 4 - The regulation of financial services	-	Not started
Chapter 4 - Test	-	Completed
Chapter 5 - The Financial Services Authority Part 1: Its responsibilities and approach to regulation	-	Not started
Chapter 5 Part 1 - Test	-	Completed
Chapter 5 - The Financial Services Authority Part 2: The FSA Handbook	-	Not started
Chapter 5 Part 2 Test	-	Completed
Chapter 6 - Principles and rules as set out in the regulatory framework	-	Not started
Chapter 6 - Test	-	Completed
Chapter 7 - The regulatory advice framework	-	Not started
Chapter 7 - Test	-	Completed

**Your study text**  
Click here to access your material online

**Discussions**  
Advanced Diploma in Financial Planning  
Diploma in Regulated Financial Planning  
Diploma in Financial Planning  
Certificate in Financial Planning  
Advanced Diploma in Insurance  
Diploma in Insurance  
Certificate in Insurance  
Award in London Market Insurance

**My Notes**  
(No notes to show)  
Type a new note:  
Priority: 1  
Sort by: Last update  
Add

**QUESTION PACKS**  
practice, perform, pass  
Find out more and buy online



# Additional features

In addition to study and revision tools, you'll find a number of other features to support you with your studies.

Full details are given opposite.



## My profile

Here you can edit and manage your profile, including post a blog and review your discussion posts.



## Help & FAQs

Our frequently asked questions are answered here. You'll also find details of the minimum system and hardware requirements for using RevisionMate, plus contact details for help and support.



## Feedback

We welcome your feedback, positive or otherwise. Here you can complete our user satisfaction survey and give us any suggestions you have on how we can improve our service.



## Updates

This area contains information on all the latest changes and enhancements to RevisionMate. It also provides links to all the latest updates to CII study texts. You can also receive these updates by subscribing to the RevisionMate RSS feed.

# Got a question?

Our most frequently asked questions are answered opposite.

## **How do I access RevisionMate?**

To access RevisionMate, you'll need to log in using the following two-step process:

1. Go to **www.revisionmate.com**
2. Log in using:
  - Your CII PIN as your username
  - Your surname as your password (in lower case omitting any hyphens or apostrophes)

## **What units is RevisionMate available for?**

RevisionMate is available for the all units across the following CII qualifications:

Foundation Insurance Test, Award in London Market Insurance, Certificate in Financial Administration; Certificate in Financial Planning, Certificate in Insurance, Diploma in Financial Planning, Diploma in Regulated Financial Planning, Diploma in Insurance and selected Advanced Diploma in Financial Planning and Insurance units.

## **How do I access additional RevisionMate exam units?**

As long as RevisionMate is available for an exam unit, once you purchase the study text, you'll automatically be given RevisionMate enrolment for that unit. **Note:** RevisionMate enrolments can take up to 3 working days to go live from when your study option order is processed by the CII.

## **Can I buy RevisionMate if I don't have the study text?**

No, RevisionMate enrolments are exclusively available to candidates with a corresponding live study option.

## **My employer purchased my study option as part of a bulk order, this isn't linked to my PIN, can I still access RevisionMate?**

Yes, however your employer will need to complete a RevisionMate bulk enrolment request.

They will need to contact their CII Corporate Development Manager or email [customer.corpserv@cii.co.uk](mailto:customer.corpserv@cii.co.uk) for details.

## **My question isn't answered here, who can I contact for help?**

Technical problems or questions that aren't answered here can be emailed to [revisionmateadmin@cii.co.uk](mailto:revisionmateadmin@cii.co.uk) You'll get a reply from a member of the RevisionMate team within 2 working days.