



Chartered
Insurance
Institute

Step
Forward

Further Education Partnerships

The Chartered Insurance
Institute working with Pearson



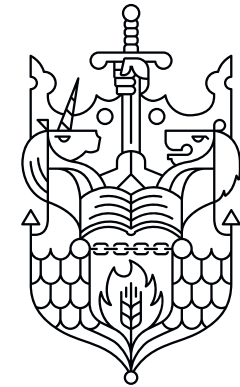


Prepare your
students for
a rewarding
career in **Financial
planning** with
professional
qualifications
from the Chartered
Insurance Institute

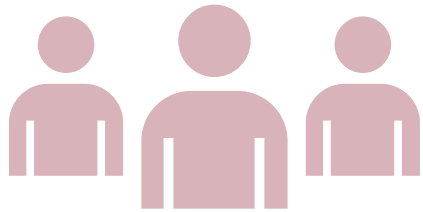
About the CII

We are a professional body dedicated to building public trust in the insurance and financial planning professions. Our strapline, Standards – Professionalism – Trust, embodies our commitment to driving confidence in the power of professional standards: competence, integrity and care for the customer.

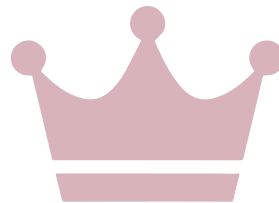
We deliver that commitment through relevant learning, insightful leadership and an engaged membership. Our members commit to high professional standards by maintaining continuing professional development and adhering to a published ethical code.



Chartered
Insurance
Institute



125,000
members



**Granted Royal
Charter Status**
in 1912



70,000+
exams per year



56
Local Institutes

Contents

About the Chartered Insurance Institute

Qualification pathways

Certificate in Financial Services - General route

Apprenticeship in Financial Planning

Certificate in Financial Services - Life & Pensions route

Careers

Benefits

Case study

Fees

Contact us

Pearson have teamed up with the Chartered Insurance Institute (CII) to offer the opportunity to study towards a Certificate Level CII professional qualification in Financial Planning alongside the BTEC Extended Diploma in Business.

The CII is the professional body for the Financial Planning and Insurance professions.

Studying towards a CII professional qualification will improve the prospects of securing a career with a clear progression route in Financial Planning or Insurance which is sought after by employers.

Further units will need to be taken after completion of the BTEC to complete the CII Certificate, but for students it's a real chance to start a rewarding career with great opportunities at entry level.

Learn more about the Chartered Insurance Institute and their Certificate Level qualifications



Select your pathway:

**Certificate in
Financial Services -
General route**

**Apprenticeship in
Financial Planning**

**Certificate in
Financial Services -
Life & Pensions route**



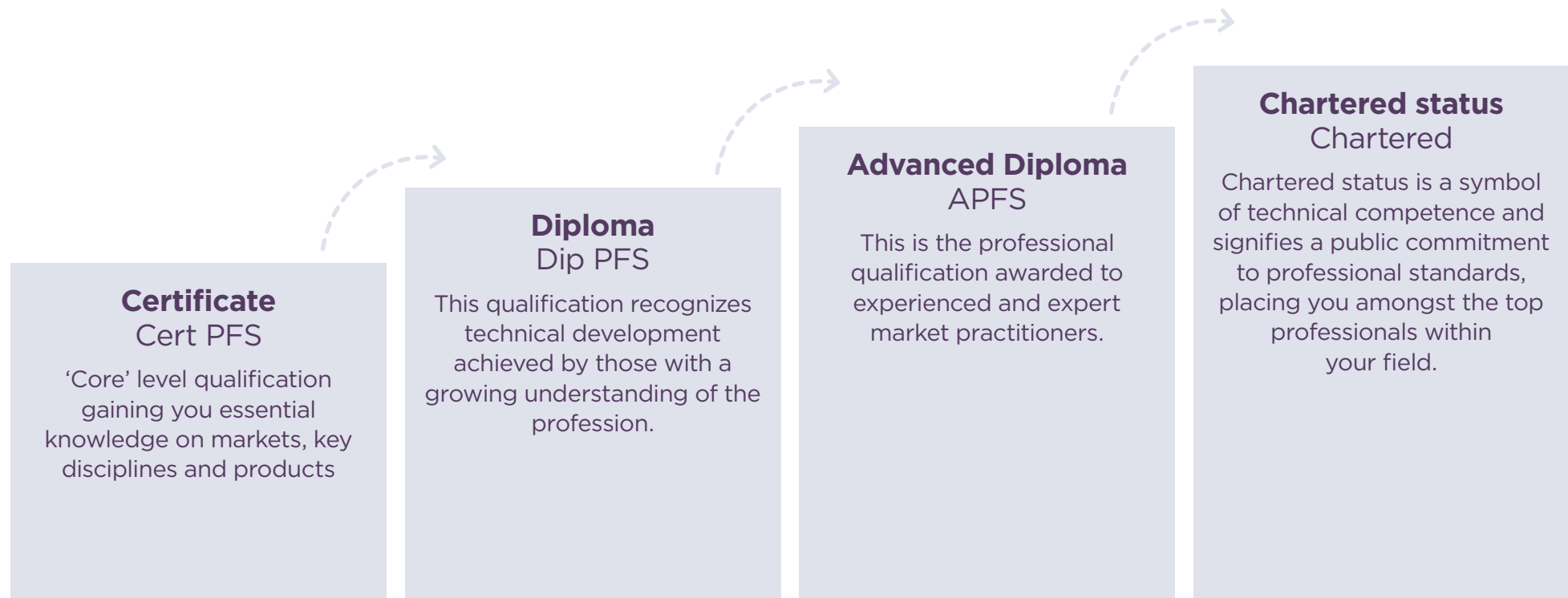
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The CII financial planning qualifications pathway



Chartered
Chartered Insurance Institute



Chartered Insurance Institute professional qualifications entitle you to a professional designation

Certificate in Financial Services - General route

Financial Planning & Financial Services study and career progression leading to an entry level role with credits towards a Certificate level professional qualification with the Chartered Insurance Institute (CII)



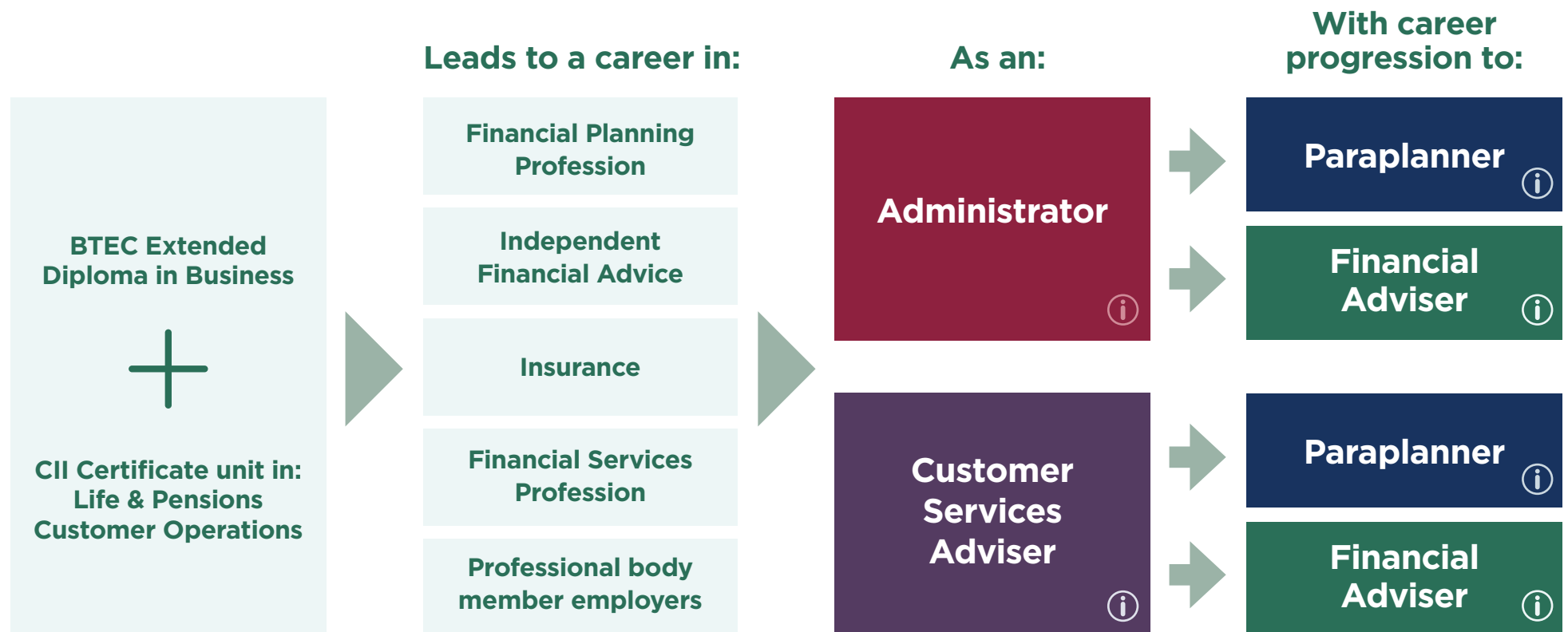
Apprenticeship in Financial Planning

Financial Planning & Financial Services study and career progression leading to an opportunity to undertake an Apprenticeship.



Certificate in Financial Planing - Life & Pensions route

Life & Pensions study and career progression leading to an entry level role with credits towards a Certificate level professional qualification with the Chartered Insurance Institute (CII)



Administrator



Communicator



**Well organised
with an eye for detail**



IT skills



**Strong interpersonal
skills - team player**

Responsibilities

- Use a variety of software packages (including Microsoft Excel, Word, Access and Outlook, PowerPoint) to manage data and produce documents and presentations.
- Use content management systems (CMS) to maintain and update websites and internal databases.
- Keep diaries and arrange appointments.
- Book meeting rooms and conference facilities.
- Liaise with staff in other departments and with external contacts.
- Organize travel and accommodation for staff and other external contacts.
- Manipulate statistical data.
- Arrange in-house and external events.

Career Prospects

A career may be developed in number of ways by progressing from an Administrator role to a Junior Paraplanner, then on to a Paraplanner or Financial Adviser.

Next role >

Customer Services Adviser



Communicator



Diplomacy



IT skills



**Strong
interpersonal skills**

Responsibilities

- Telephony - answering calls, emails and web chat enquiries from businesses, private or company investors, customers or members of the public.
- Customer Service - dealing with customer queries, customer payments, enquiries and complaints.
- Sales - advising about products and services.
- Supporting customers to fix computer problems, updating customers' records on computer databases.

Career Prospects

A career may be developed in number of ways by progressing from an Administrator role to a Junior Paraplanner, then on to a Paraplanner or Financial Adviser.

Next role >

Paraplanner



Communicator



Eye for detail



IT skills



**Research and
problem solving**

Responsibilities

- Modelling personal finance requirements.
- Researching consumer financial products.
- Implementing advice (processing applications or investment switches).
- Maintaining compliance knowledge in a regulated profession.

Career Prospects

Senior paraplanner or team leader, Practice Development Manager, Financial Adviser.

Financial Adviser



Communicator



Analytical



Entrepreneurial



Strong interpersonal skills

Responsibilities

- Acquiring and maintaining client relationships.
- Reviewing client needs.
- Researching products.
- Producing plans to achieve client objectives.
- Negotiating rates with financial product suppliers.
- Maintaining technical knowledge.
- Preparing financial reports.

Career Prospects

Senior adviser, team leader, business management, business ownership.

Benefits to Pearson BTEC Centres

Employability

Strengthening of your proposition for students, linking directly to employability

- The CII is the recognised professional body amongst employers

Support

Access to our Education Partnership team and resources and materials produced or endorsed by the CII

Competitive Edge

Ability to leave further education with a professional qualification and defined career pathway is attractive to students

Build links with employers

Offering CII qualifications can help cement relationships with employers in the financial services sector

Benefits to your students

Employability

The CII is the recognised professional body amongst employers

Networking

Fast-track your career through our Local Institutes, Regional Committees and professional networking opportunities

Discounts

Access discounts and deals on a wide range of products and services through our Perks programme

Insight

Our member publications and communications provide valuable market insight

Events

Nationwide events that bring members of the profession together, allowing them to enhance their knowledge and best practice

Mentoring

Get expert support for your career development with our e-mentoring scheme, eConnect

A view from one of our education partners



How our programme has worked for Coventry University

“I started my career 25 years ago and in addition to my academic qualifications, I am also qualified as a Chartered Financial Planner, a Fellow of the Personal Finance Society and a registered Life Planner with the Kinder Institute.

“At Coventry University, we run the Wealth Management Mentoring Scheme, giving students exposure to financial planning. In addition, their ability to take R01 before they graduate makes them very employable.

“This enables our students to consolidate their learning and obtain valuable qualifications, especially when they have already studied a personal finance module in year one and a financial services module in year two. Even if they do not pursue a career in this sector, I believe that taking these financial services professional qualifications will give them a lot of personal benefits.”

Dr Lien Luu, Associate Professor in Finance at Coventry University



Schedule of Fees

**FREE membership for Pearson students. CII unit fees are approx 1/3 off the usual full member unit rate.
It is proposed all CII fees are subsumed in the centre's funding of their programme**


Matter	Price per student	Usual member price
FIT - Award for the Foundation Insurance Test (FIT) - Study Text (Printed/Digital); RevisionMate, Revision Aids and Exam	£92	£162.00
CF1 - UK financial services, regulation & ethics	£142.00	£282.00
Unit R01 - Financial services, regulation and ethics - Enrolment plus - Study Text (Printed/Digital); RevisionMate, Revision Aids and Exam	£142.00	£282.00
LP1 - Life and pensions customer operations - Enrolment plus - Study Text (Printed/Digital); RevisionMate, Revision Aids and Exam	£120.00	£163.00
LP2 - Financial services products and solutions - Enrolment plus - Study Text (Printed/Digital); RevisionMate, Revision Aids and Exam	£120.00	£163.00
LM1 - London Market Insurance Essentials - Study Text (Printed/Digital); RevisionMate, Revision Aids and Exam	£172.00	£241.00

Please note that all fees are indicative, and are subject to change.

Contact us

For further information about this programme please contact Pearson

 fecentresupport@pearson.com

 0845 373 0114

(Calls cost 3p per minute plus your phone company's access charge)

For further information regarding the Chartered Insurance Institute please contact

 EducationPartnershipCoordinator@cii.co.uk

 @ciigroup @pfsconf



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