



Chartered
Insurance
Institute

Future Focus

2026 Qualifications Brochure



Personal Finance Qualifications

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Price List Explainer

What does 'Enrolment' and 'Enrolment Plus' refer to?

Learners can purchase qualification units in two ways, either by Enrolment or Enrolment Plus

- **Enrolment** provides learners with the study text and assessment entry
- Whereas the **Enrolment Plus** option provides learners with the study text, assessment entry, plus selected revision aids at a discounted rate

Why is a postage fee needed?

- A flat fee of £13 is charged per order (not per item) when printed materials are ordered to cover the delivery costs

What revision aids are available and how do they help?

Selected units have additional revision aids that can be purchased to maximise learning, these include;

- **Key Fact Booklets** – these aids summarise the key information contained in the study text and are perfect for studying on-the-go (available in digital or printed format)
- **Knowledge Checker** – delivered online via RevisionMate this tool provides comprehensive, flexible and interactive self-testing, helping learners track progress and strengthen their understanding of the study text*
- **E-learn** – delivered online via RevisionMate to complement the study text, this module offers engaging study with interactive content to help reinforce understanding of key topics
- **Audio downloads** – accessed via RevisionMate, the R01-6 audio downloads cover key elements of each subject, while AF1 and AF4 focus on key Diploma learning points that underpin application at Advanced Diploma level, together with exam technique guidance
- **Video Technical Guide** – available for purchase 2 weeks prior to the examination date for units R06 & AF5 only, this is based on the case studies or fact-find released for specific exam sittings where a subject expert breaks down the main areas of knowledge that are mainly covered in the exam
- **Revision Extra** - available for R01-4 and delivered mainly through videos, this digital course is created by subject experts to give their insight into the unit syllabus

What is Coursework Resubmission?

- Coursework re-submission is the equivalent of an 'exam resit' but for a coursework assignment
- Coursework re-submission can be purchased when a fail grade has been received
- Coursework assignments can only be re-submitted twice and all re-submissions must be completed before the end of the enrolment period

What is Review of Marking?

- This is a post result review of the original marking to ensure that the agreed mark scheme has been applied correctly
- it is available for written exam units (not multiple choice question units) and coursework assignments
- Applications must be made within four weeks of the release date of the results

What is 'Recognition of Prior Learning' (RPL) and how much does it cost?

Learners may be eligible to claim exemptions for relevant exams and qualifications obtained through other professional bodies or universities. Subject to the published qualification completion requirements, these can be used to help you achieve CII qualifications more quickly.

There are two pathways for RPL with the CII:

1. **RPL Path 1:** Prior learning awards for business, law and maths degrees are charged at **50% of the Enrolment price of the CII unit(s)**. The same applies to other qualifications whose learning outcomes and modules have a different structure to CII qualifications. These qualifications partially meet the learning outcomes across multiple CII units.
2. **RPL Path 2:** Prior learning awards for CII affiliated institutes' qualifications and other licence to practice qualifications are charged at **20% of the Enrolment price of the CII unit(s)**. Examples include (UK) FCA Appropriate Qualifications that are constructed around the same set of (regulatory) standards to the CII level 4 Diploma in Regulated Financial Planning and other qualifications whose modules and learning outcomes have the same structure as CII qualifications.

Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal					
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format		Digital Format		Digital Format		Digital Format		Digital Format		Printed & Digital Formats		
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P

Award in Life and Pensions Foundations

LF1	Life and Pensions Foundations	£119	£148	£133	£148	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Exam Resit:		Member price £66 / Non-member price £79																											
Recognition of Prior Learning:		Path 1 Member price £59.50 / Non-member price £74.00														Path 2 Member price £23.80 / Non-member price £29.60													

Award in Financial Administration

CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-	
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	
FA1	Life Office Administration	£200	£242	£213	£260	£13	-	-	-	-	-	£34	£39	£40	£46	£13	-	-	-	-	-	-	-	-	-	-	-		
FA2	Pensions Administration	£200	£242	£213	£260	£13	-	-	-	-	-	£34	£39	£40	£46	£13	-	-	-	-	-	-	-	-	-	-	-		
Exam Resit for units CF1, FA1, FA2:		Member price £134 / Non-member price £159																											
Exam Resit for unit R01:		Member price £146 / Non-member price £200																											
Recognition of Prior Learning for units CF1, FA1, FA2:		Path 1 Member price £100.00 / Non-member price £121.00														Path 2 Member price £40.00 / Non-member price £48.40													
Recognition of Prior Learning for unit R01:		Path 1 Member price £117.00 / Non-member price £167.00														Path 2 Member price £46.80 / Non-member price £66.80													

All prices include VAT (where VAT is applicable)



KEY:	
M:	Member
NM:	Non-Member
*:	Included as standard in Enrolment Plus
+P&P:	Plus postage & packaging

Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal					
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format		Digital Format		Digital Format		Digital Format		Digital Format		Printed & Digital Formats		
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P

Award in Long Term Care Insurance

CF8	Long Term Care Insurance	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Exam Resit:		Member price £134 / Non-member price £159																										
Recognition of Prior Learning:		Path 1 Member price £100.00 / Non-member price £121.00												Path 2 Member price £40.00 / Non-member price £48.40														

Certificate in Investment Operations

CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-
FA5	Individual Savings Account Administration	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	
Exam Resit for units CF1, FA5:		Member price £134 / Non-member price £159																										
Exam Resit for unit R01:		Member price £146 / Non-member price £200																										
Recognition of Prior Learning for units CF1, FA5:		Path 1 Member price £100.00 / Non-member price £121.00												Path 2 Member price £40.00 / Non-member price £48.40														
Recognition of Prior Learning for unit R01:		Path 1 Member price £117.00 / Non-member price £167.00												Path 2 Member price £46.80 / Non-member price £66.80														

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Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal					
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format		Digital Format		Digital Format		Digital Format		Digital Format		Printed & Digital Formats		
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P

Certificate in Regulated Financial Services Operations

Unit Code	Unit Title	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-
CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-
FA1	Life Office Administration	£200	£242	£213	£260	£13	-	-	-	-	-	£34	£39	£40	£46	£13	-	-	-	-	-	-	-	-	-	-	-	-
FA2	Pensions Administration	£200	£242	£213	£260	£13	-	-	-	-	-	£34	£39	£40	£46	£13	-	-	-	-	-	-	-	-	-	-	-	-
FA5	Individual Savings Account Administration	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Exam Resit for units CF1, FA1, FA2, FA5: Member price £134 / Non-member price £159
Exam Resit for unit R01: Member price £146 / Non-member price £200

Recognition of Prior Learning for units CF1, FA1, FA2, FA5: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40
Recognition of Prior Learning for unit R01: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

Certificate in Securities Advice and Dealing

Unit Code	Unit Title	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-
R02	Investment Principles and Risk	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-
R03	Personal Taxation	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-
J12	Securities Advice and Dealing	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Exam Resit: Member price £146 / Non-member price £200

Recognition of Prior Learning: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

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Unit Code	Unit Title	Enrolment					Enrolment Plus					Key Facts Booklet*					Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal				
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Printed & Digital Formats				
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P

Certificate in Mortgage Advice

CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-
CF6	Mortgage Advice	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-	

Exam Resit for units CF1, CF6: Member price £134 / Non-member price £159
 Exam Resit for unit R01: Member price £146 / Non-member price £200

Recognition of Prior Learning for units CF1, CF6: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40
 Recognition of Prior Learning for unit R01: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

Certificate in Advanced Mortgage Advice

R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-
CF6	Mortgage Advice	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-
R07	Advanced Mortgage Advice	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Exam Resit for unit CF6: Member price £134 / Non-member price £159
 Exam Resit for units R01, R07: Member price £146 / Non-member price £200

Recognition of Prior Learning for unit CF6: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40
 Recognition of Prior Learning for units R01, R07: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

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Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal				
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Printed & Digital Formats			
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM

Certificate in Equity Release

CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-
CF6	Mortgage Advice	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-	
ER1	Equity Release	£200	£242	£213	£260	£13	-	-	-	-	-	£34	£39	£40	£46	£13	-	-	-	-	-	-	-	-	-	-	-	-	

Exam Resit for units CF1, CF6, ER1: Member price £134 / Non-member price £159
Exam Resit for unit R01: Member price £146 / Non-member price £200

Recognition of Prior Learning for units CF1, CF6, ER1: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40
Recognition of Prior Learning for unit R01: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

Certificate in Financial Services (general route)

CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-
LP2	Financial Services Products and Solutions	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Exam Resit for units CF1, LP2: Member price £134 / Non-member price £159
Exam Resit for unit R01: Member price £146 / Non-member price £200

Recognition of Prior Learning for units CF1, LP2: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40
Recognition of Prior Learning for unit R01: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

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Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal				
		Digital Format		Printed & Digital Formats			Digital Format	Printed & Digital Formats				Digital Format	Printed & Digital Formats		Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Printed & Digital Formats				
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P	

Certificate in Financial Services (life and pensions route)

LP1	Life and Pensions Customer Operations	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
LP2	Financial Services Products and Solutions	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
LP3	Life and Pensions Principles and Practices	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Exam Resit: Member price £134 / Non-member price £159

Recognition of Prior Learning: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40

Certificate in Discretionary Investment Management

R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£476	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-
J10	Discretionary Investment Management	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Exam Resit: Member price £146 / Non-member price £200

Recognition of Prior Learning: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80

All prices include VAT (where VAT is applicable)



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M: Member
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*: Included as standard in Enrolment Plus
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Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal				
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Printed & Digital Formats			
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM

Certificate in Paraplanning

Unit Code	Unit Title	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-
R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-
CF1	UK Financial Services, Regulation and Ethics	£200	£242	£213	£260	£13	£255	£312	£271	£330	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	-	-	-	-	-	-	-	-	-
R02	Investment Principles and Risk	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-
R03	Personal Taxation	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-
J09	Paraplanning	£519	£644	£565	£693	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	

Exam Resit for units R01, R02, R03: Member price £146 / Non-member price £200
Exam Resit for unit CF1: Member price £134 / Non-member price £159
Coursework Resubmission for unit J09: Member price £146 / Non-member price £200

Review of Marking (available for unit J09 only): Member price £93 / Non-member price £93

Recognition of Prior Learning for units CF1: Path 1 Member price £100.00 / Non-member price £121.00
Recognition of Prior Learning for unit R01, R02, R03: Path 1 Member price £117.00 / Non-member price £167.00
Recognition of Prior Learning for unit J09: Path 1 Member price £259.50 / Non-member price £322.00
Path 2 Member price £40.00 / Non-member price £48.40
Path 2 Member price £46.80 / Non-member price £66.80
Path 2 Member price £103.80 / Non-member price £128.80

All prices include VAT (where VAT is applicable)



KEY:
M: Member
NM: Non-Member
*: Included as standard in Enrolment Plus
+P&P: Plus postage & packaging

Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*					Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal					
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Digital Format		Digital Format		Digital Format		Digital Format		Digital Format		Printed & Digital Formats		
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P

Diploma in Regulated Financial Planning

R01	Financial Services, Regulation and Ethics	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-	-
R02	Investment Principles and Risk	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-	-
R03	Personal Taxation	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-	-
R04	Pensions and Retirement Planning	£234	£334	£254	£359	£13	£348	£470	£366	£502	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-	-
R05	Financial Protection	£200	£242	£213	£260	£13	£310	£370	£324	£390	£13	£34	£39	£40	£46	£13	£40	£46	£60	£67	£58	£63	-	-	-	-	-	-	-	-
R06	Financial Planning Practice	£234	£334	£254	£359	£13	£311	£416	£329	£445	£13	£34	£39	£40	£46	£13	-	-	£60	£67	£58	£63	£124	£147	-	-	-	-	-	-

Exam Resit for units R01, R02, R03, R04, R06: Member price £146 / Non-member price £200
 Exam Resit for unit R05: Member price £134 / Non-member price £159

Review of Marking (available for unit R06 only): Member price £93 / Non-member price £93

Recognition of Prior Learning for units R01, R02, R03, R04, R06: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80
 Recognition of Prior Learning for unit R05: Path 1 Member price £100.00 / Non-member price £121.00 Path 2 Member price £40.00 / Non-member price £48.40

Award in Regulated Pension Transfer Advice

AF7	Pension Transfers	£328	£427	£359	£465	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
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Exam Resit: Member price £153 / Non-member price £211

Review of Marking: Member price £93 / Non-member price £93

Recognition of Prior Learning: Path 1 Member price £164.00 / Non-member price £213.50 Path 2 Member price £65.60 / Non-member price £85.40

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+P&P:	Plus postage & packaging

Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal				
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Printed & Digital Formats				
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P	

Diploma in Financial Planning

J10	Discretionary Investment Management	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
J12	Securities Advice and Dealing	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
J02	Trusts	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
J05	Pension Income Options	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
J07	Supervision in a Regulated Environment	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
J09	Paraplanning	£519	£644	£565	£693	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
R07	Advanced Mortgage Advice	£234	£334	£254	£359	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Exam Resit for units J10, J12, J02, J05, J07, R07: Member price £146 / Non-member price £200
 Coursework Resubmission for unit J09: Member price £146 / Non-member price £200

Review of Marking (available for units J02, J05, J07, J09 only): Member price £93 / Non-member price £93

Recognition of Prior Learning for units J10, J12, J02, J05, J07, R07: Path 1 Member price £117.00 / Non-member price £167.00 Path 2 Member price £46.80 / Non-member price £66.80
 Recognition of Prior Learning for unit J09: Path 1 Member price £259.50 / Non-member price £322.00 Path 2 Member price £103.80 / Non-member price £128.80

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Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal					
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format		Digital Format		Digital Format		Digital Format		Digital Format		Printed & Digital Formats		
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P

Advanced Diploma in Financial Planning

AF1	Personal Tax and Trust Planning	£328	£427	£359	£465	£13	-	-	-	-	-	-	-	-	-	-	-	-	£92	£103	-	-	-	-	-	-	-	-
AF4	Investment Planning	£328	£427	£359	£465	£13	-	-	-	-	-	-	-	-	-	-	-	-	£92	£103	-	-	-	-	-	-	-	-
AF5	Financial Planning Process**	£173	£240	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	£185	£222	-	-	-	-	-	-
AF7	Pension Transfers	£328	£427	£359	£465	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
AF6	Senior Management and Supervision	£572	£710	£618	£758	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
AF8	Retirement Income Planning	£572	£710	£618	£758	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-

Exam Resit for units AF1, AF4, AF5, AF7: Member price £178 / Non-member price £240
 Coursework Resubmission for units AF6, AF8: Member price £146 / Non-member price £200

Review of Marking: Member price £93 / Non-member price £93

Recognition of Prior Learning for units AF1, AF4, AF7: Path 1 Member price £164.00 / Non-member price £213.50 / Path 2 Member price £65.60 / Non-member price £85.40
 Recognition of Prior Learning for unit AF5: Path 1 Member price £86.50 / Non-member price £120.00 / Path 2 Member price £34.60 / Non-member price £48.00
 Recognition of Prior Learning for units AF6, AF8: Path 1 Member price £286.00 / Non-member price £355.00 / Path 2 Member price £114.40 / Non-member price £142.00

- **AF5:
- A case-study workbook is not offered for this unit as it draws together and tests knowledge gained through the study of other AF units.
 - Leaners receive a 'fact-find' two weeks before the exam, from which a financial plan will need to be drawn up in the exam.
 - Therefore, this enrolment consists of an examination entry only

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Unit Code	Unit Title	Enrolment					OR	Enrolment Plus					Key Facts Booklet*		Knowledge Checker*		E-learn*		Audio*		Videos		Study Text Renewal				
		Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats			Digital Format		Printed & Digital Formats		Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Digital Format	Printed & Digital Formats			
		M	NM	M	NM	+ P&P	M	NM	M	NM	+ P&P	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	M	NM	+ P&P	

Group Risk

GR1	Group Risk	£200	£242	£213	£260	£13	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Exam Resit:		Member price £134 / Non-member price £159																								
Recognition of Prior Learning:		Path 1 Member price £100.00 / Non-member price £121.00										Path 2 Member price £40.0 / Non-member price £48.40														

Regulated Retail Investment Adviser Re-evaluation

RAR	Regulated Retail Investment Adviser Re-evaluation	£146	£200	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
Exam Resit:		Member price £142 / Non-member price £194																								

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Further Learning

Partnered Courses & Qualifications	M	NM
Certificate in Climate Risk	£670	£670
Introduction to Data Science and AI for Insurance Course	£1,236	£1,545
Spotlight Focus Courses		
SDRs and Anti-Greenwashing Rule	£31	£41
Spotlight Courses		
ESG & Sustainable Investment	£126	£173
Consumer Duty Digital Learning Suite Bundle	£135	£229
> Consumer Duty Practice Diagnostic Tool	£1	£66
> Overview of Consumer Duty Regulations	£12	£16
> <u>Spotlight</u> : Consumer Duty Good Practice Examples	£53	£68
> <u>Spotlight</u> : Consumer Duty Action Planning Process	£104	£136

All prices include VAT (where VAT is applicable)

Qualification Completion Prices*

*All qualification completion prices are indicative and based on:

1. Purchase of the digital and print format Enrolment Only package^ for each unit taken
2. An assumption that each unit is passed at the first attempt with no exam resits involved
3. Postage & Packing costs (£13 per order) not being included in the cost shown – the number of orders placed to complete a qualification will vary by individual

^ Revisions aids can be purchased at extra cost either individually or through the Enrolment Plus package where available

Advanced Diploma in Financial Planning price is based on an illustration where 120 credits have been obtained from Advanced Diploma units, 140 credits have been obtained from Diploma units and the remainder of the 290 required credits have been achieved from Certificate units - Other combinations are possible and consequently will have a different price to the one shown here

Enrolment	
M	NM

Enrolment	
M	NM

Personal Finance Qualifications	Total Cost	
Award in Life & Pensions Foundations	£133	£168
Award in Long Term Care Insurance	£213	£260
Award in Financial Administration	£467	£619
Certificate in Investment Operations	£467	£619
Certificate in Regulated Financial Services Operations	£680	£879
Certificate in Mortgage Advice	£426	£520
Certificate in Advanced Mortgage Advice	£721	£978
Certificate in Equity Release	£639	£780

Personal Finance Qualifications	Total Cost	
Certificate in Financial Services (general route)	£467	£619
Certificate in Financial Services (life & pensions route)	£639	£780
Award in Regulated Pension Transfer Advice	£359	£465
Certificate in Discretionary Investment Management	£508	£718
Certificate in Paraplanning	£1,327	£1,770
Certificate in Securities Advice and Dealing	£1,016	£1,436
Diploma in Regulated Financial Planning	£1,483	£2,055
Diploma in Financial Planning	£2,089	£2,847
Advanced Diploma in Financial Planning	£4,024 #	£5,295 #

All prices include VAT (where VAT is applicable)