

At a glance: Alternative assessment

The alternative assessment option is designed for experienced advisers who would prefer a non-examination route to meeting the new Level 4 qualification requirements. Individuals opting for this will need to demonstrate achievements of all the learning outcomes for the new exam standards.

The assessment involves a three-stage process:

1. **Pre-assessment diagnostic tool** – available free to anyone considering the alternative assessment, to help them determine their suitability and to ensure they understand the requirements and what will be involved.
2. **Evidence submission** – the assessment process requires the submission of a portfolio of evidence as part of an application, this includes relevant qualifications held, recent and relevant work-based activity and CPD undertaken in order to demonstrate prior learning.
3. **Assessment day** – includes a professional discussion with a CII qualified assessor based on 4 short case studies, and a technical interview with an independent assessor to establish equivalent knowledge and skills levels.

This is a demanding option which involves satisfying all of the learning points associated with the RDR exam standards. Successful completion is evidenced through a combination of relevant exams already held, recent and relevant evidence from day-to-day work activities, and both tests and verbal assessments conducted during an intensive assessment day.

It is also the most expensive option at £1,950 due to the high level of resource required to conduct this assessment in a single day.

On successful completion the Diploma in Regulated Financial Planning qualification will be awarded.

Interested in finding out more?

The first step for anyone considering the alternative assessment is to access the online pre-assessment diagnostic tool, as detailed above. This can be accessed at www.cii.co.uk/alternative-assessment