

Learning Statement



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Date: 17/10/08
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Dear Mr Smith

Your Personalised CII Financial Services Learning Statement

This Learning Statement provides a record of the exams and qualifications you hold which can be used towards completing CII financial services qualifications. This includes both CII exams and exams obtained through other awarding bodies (such as other professional bodies, universities and the like) that you have told us about.

CII qualifications are completed by obtaining specified combinations of units and/or levels of credits. This statement therefore provides a practical aid to planning your qualification studies.

The guidance notes provided overleaf will help you understand the information shown below.

Level	Credits	Unit codes and credits
Diploma	40	J03(20) J04(20)
Certificate	70	CF1(15) CF2(20) CF3(10) CF4(10) CF5(15)
Total credits in financial services	110	

Requirements to complete the Diploma in Financial Planning

To complete you need 40 financial services credits at Diploma level

Completed Qualifications

Certificate in Financial Planning

Understanding your 'Learning Statement'

The following notes are to help you correctly interpret the information given on the front of your Learning Statement, which is especially helpful when planning further study.

Before entering for a new qualification or exam unit at any level, we would, however, recommend that you read the full details relating to studying for this which can be found at www.cii.co.uk as we regularly review and update our qualifications.

This will provide you with details of the units on offer; entry requirements; compulsory units; barred unit combinations; the range of study options and revision aids available; dates of exams; and the full terms and conditions that apply.

Table

This summarises the exams you have passed to-date and the corresponding credits that attach to them.

- **Level column** – this identifies the qualification level to which the information in the next two columns relates.
- **Credits column** – this sets out the credits you currently hold at each qualification level.
- **Unit codes and credits column** – this typically lists the code of the exam unit(s) passed followed in brackets by the number of credits that relate to that unit.

There are some exceptions to this which are as follows:

- **NSC** = Non-specific credits are those awarded for accredited prior learning (previously known as exemptions).
- **XXX (o)** = with XXX being a CII unit code e.g. CF2, is shown where you hold an equivalent exam from the CII or other awarding body, in respect of which the credits appear against another unit shown on this statement. This means you do not need to complete this unit. Should you choose to do so no further credits will be awarded.
- **AC1** = Financial Advisers' International Qualification/Award in Financial Planning.
- **Total Credits** – this details the total number of credits held.

Detailed are the financial services credits you hold. For details of all the credits you hold, including those related to insurance exams and qualifications, please submit a request selecting the 'overview statement' option at www.cii.co.uk/learningstatement

Insurance exam credits cannot be used towards financial services qualifications. And, while financial services credits can be used towards insurance qualifications there are limits on the number that can be used in this way.

Full details can be found at www.cii.co.uk within the section provided on each qualification.

Requirements to complete

This section summarises what you now need to do to complete the qualification you have indicated that you are considering, or are currently working towards in terms of, where appropriate: compulsory unit requirements, the total credits needed to complete and requirements relating to the need to obtain credits at particular levels.

Completed qualifications

Listed in ascending order are the CII qualifications you have passed. This includes details of qualifications you may have passed which are no longer offered by the CII.

Where appropriate, these will be listed in two columns, one listing the financial services qualifications held and the second detailing the insurance qualifications held.

Further information

Should you have questions on anything detailed above please call Customer Service on +44 (0)20 8989 8464, email customer.serv@cii.co.uk or visit www.cii.co.uk