

October 2016 Examination – J11 Wrap and Platform Services

Syllabus learning outcomes being examined

| | |
|----|--|
| 1. | 1. Explain the use of platforms in providing financial planning services. |
| 2. | 4. Assess the appropriateness and operation of platforms in meeting client requirements. |
| 3. | 3. Explain the charging structures and costs for using platforms. |
| 4. | 2. Explain the legal and regulatory context of platforms. 4. Assess the appropriateness and operation of platforms in meeting client requirements. |
| 5. | 1. Explain the use of platforms in providing financial planning services. |
| 6. | 4. Assess the appropriateness and operation of platforms in meeting client requirements. |
| 7. | 3. Explain the charging structures and costs for using platforms. 4. Assess the appropriateness and operation of platforms in meeting client requirements. |
| 8. | 1. Explain the use of platforms in providing financial planning services. 2. Explain the legal and regulatory context of platforms. 4. Assess the appropriateness and operation of platforms in meeting client requirements. |