

April 2017 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 regulatory and legal context of platforms. 4. Assess the appropriateness and operation of platforms in meeting client requirements.
5.	4. Assess the appropriateness and operation of platforms in meeting client requirements.
6.	5. Explain the workplace platform proposition for pensions and other financial products and services.
7.	1. Explain the use of platforms in providing financial planning services. 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 regulatory and legal context of platforms. 4. Assess the appropriateness and operation of platforms in meeting client requirements.