

Learning Statement



Mr A J Day FPFS
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Date: 21/10/15
PIN : 001242146H

Dear Mr Day

Your Personalised CII Learning Statement

This Learning Statement provides a record of the exams and qualifications you hold which can be used towards completing CII 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
Advanced Diploma	250	G10(30) G20(30) G30(30) G60(30) G70(30) G80(30) H25(30) K10(20) K20(20)
Diploma	40	J05(20) SV1(20)
Certificate	60	CF1(0) CF2(0) CF3(0) CF4(0) CF5(0) CF9(10) FP1(16) FP2(16) FP3(18)
Total credits in insurance	0	
Total credits in financial services	350	

Completed Qualifications - Financial

Fellowship
Advanced Diploma in Financial Planning
Diploma in Financial Planning
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; 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:

- **T92** = pre-92 examination credits
- **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. IF2, 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.
 - Where FP2#(o) is shown (see above) you will, in order to calculate your total **financial services credits**, need to add 16 to your total shown overleaf and, correspondingly, reduce the insurance credits total shown by 16.
 - *Against units CF2, CF6, CF7 & CF8 at Certificate level = units counted at Diploma level.
- **AC1** = Financial Advisers' International Qualification/Award in Financial Planning.
- **Total Credits** – this details the total number of 'financial services' and/or 'insurance' credits held.

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.

Completed qualifications

Listed are the CII qualifications you have passed or their current equivalent. Where a current equivalent exists it will not generate entitlement to a further certificate.

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