

CII Financial Planning Process (AF5) Study Day – April 2018 Exam

Sheffield CII (Life & Pensions Society) are pleased to offer a one day study programme in preparation for the April 2018 sitting of the AF5 (Financial Planning Process) exam, in association with Financial Adviser Academy.

DATE **Wednesday 4th April 2018**
LOCATION Aviva Pomona Centre, Pear Street Sheffield.
COST £150 including all course material

AGENDA
Standing in the examiner's shoes
Fact-find analysis – group work <ul style="list-style-type: none"> • Client objectives • Tax • Risk assessment • Dealing with 'unusual' issues
Reviewing all technical aspects of the clients
Practice with potential questions and model answers Exam technique rehearsed

ABOUT THE TRAINER

Steve Davis is a CII -accredited trainer at advanced level with over 1,000 CII exam credits. Find out more about Steve and The Financial Adviser Academy via the following link:

<http://www.financialadviseracademy.org.uk/meet-the-team>

HOW TO BOOK

Places on this course are expected to be extremely limited. To reserve your place or with any questions, email Owen.Wright@investecwin.co.uk or tel. 0114 275 5100.

Please note attendance will be secured only on receipt of payment of full course fee.