



The Insurance
Institute of Plymouth
and Cornwall
Chartered Insurance Institute

PFS Education Programme Policy & Claim Form

Please sign the claim form and then either send it or scan and e-mail it to the Treasurer of the Institute.

Your Name (the cheque or payment will be made payable to you)	
Address for the cheque to be sent or if we can pay by bank transfer your personal account name, account number and sort code	
Your CII/PFS PIN Number	
Name of Exam	
Date of Exam	
I have read the attached policy and confirm that I do not have access to an employer supported education programme and agree to the other terms and conditions.	Your Signature
Date of Signature	
Any additional notes	



PFS Education Programme Policy & Claim Form

The Institute of Plymouth & Cornwall is pleased to offer the following exam subsidies to encourage PFS members who are not already at Diploma level to take their Diploma exams and become practicing financial planners.

- **It is a subsidy to individual members who do not have access to an employer supported education programme**
- The candidate will need to be a member of the local institute and remain a member for the term of their studies to receive the subsidies
- The candidate will need to either reside or work in the geographical area covered by the Institute for the term of their studies to receive the subsidies
- It is limited to two candidates per financial planning practice
- There will be an intention by the candidate to achieve their diploma in a three year timescale on a programme agreed with the PFS Regional Education Officer
- The exams will be taken in an order agreed by the PFS Regional Education Officer ending with R06
- The subsidy for a following exam will only be provided when the previous exam has been passed
- The candidate will need to submit a copy of their exam entry to the Treasurer of the Institute for payment of the subsidy
- The Institute will review the level of subsidy if the costs of exams and course books increase

The intention of the Local Council of the Institute is for the subsidy to be available over the term of your studies, however please note that there is no guarantee that it will be available as it is subject to budgetary approval by the Institute each financial year.

The following subsidies will be available

	Subsidy
R01 Exam subsidy	£70
R02 Exam Subsidy	£70
R03 Exam Subsidy	£50
R04 Exam subsidy	£50
R05 Exam Subsidy	£50
R06 Exam Subsidy	£110
Total	£400