



# CII Diploma in Regulated Financial Planning Public courses Online Exam centre

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# CII Diploma in Regulated Financial Planning

Reed Business School has had many years of experience in delivering accountancy training and is now using that experience to offer courses to help financial advisers achieve their RDR qualifications.

We will be running intensive revision courses for all the Diploma in Regulated Financial Planning papers. The duration for each unit will vary between 2-3 days dependent upon the paper with the on-line exam scheduled at the end of the course. This will enable you to prepare right up to entering the exam and providing you with instant results. The on-line exams are applicable for papers R01-R05; the R06 course will be timetabled just before the national exam date and after the release of the pre-released case study information which will form an integral part of the revision course preparation.

## Course preparation

Delegates are expected to have at least read and worked through the CII study text prior to attending and have accessed the CII RevisionMate login facility practice questions. Access to RevisionMate is available upon purchasing a CII study text. The recommended study hours for each paper is as follows:

Unit	Title	Recommended study hours
R01	Financial services, regulation and ethics	60
R02	Investment principles and risk	60
R03	Personal taxation	50
R04	Pensions and retirement planning	50
R05	Financial protection	50
R06	Financial planning practice	100

Please note the revision courses are designed to supplement pre-course work with quizzes, question practice and revision of key areas of the syllabus. Please ensure you attend as fully prepared as possible to maximise your chance of exam success.

## Exam format

Unit	Exam format	Length of exam	Nominal pass mark	Exam sessions	Results notification
R01	100 MCQ*	2 hours	65 %	Year round	Immediate
R02	100 MCQ	2 hours	65 %	Year round	Immediate
R03	50 MCQ	1 hour	65 %	Year round	Immediate
R04	50 MCQ	1 hour	65 %	Year round	Immediate
R05	50 MCQ	1 hour	70 %	Year round	Immediate
R06	2 written case studies on financial planning practice. Candidates receive the 2 written case studies two weeks before the exam	3 hours	55 %	23 Jan 16 April 11 June 9 July 15 Oct 26 Nov	4 weeks

\*MCQ – Multiple choice questions

## Course tutors

Our course tutors are all specialists in their subjects and have a proven track record of achieving high pass rates.

### Tom Hewitt ACII, Chartered insurer, Dip.

Tom worked for Wesleyan Financial Services from 1978. His career has been based around sales and administration staff development including professional qualification training. He qualified as an Associate of the Chartered Insurance Institute in 1996. He is involved in designing materials and lecturing many Financial Services qualifications and has a fun, interactive style of teaching that has achieved excellent results.

### Caroline Fowler ACA

Caroline specialises in lecturing taxation for all the main accountancy examinations and also lectures on accountancy and taxation practical courses. Caroline has over 12 years of experience in training. She is enthusiastic and has an ability to explain difficult technical concepts in an easy to understand manner.

### Nick Cunningham FCIB, FPFS

Nick is a full time training consultant with over thirty years' experience in financial services. He runs courses, both UK and offshore, to help students with competency development and examination support. As a Chartered Financial Planner and holder of FCIB and FPFS, Nick offers training in ifs Dip FA and a wide range of CII subjects. He has an open and interactive style of teaching which consistently produces a high level of success.

## Course dates

Unit	Revision dates	Exam date & time
R01	16-18 Jan 13-15 Feb 28-30 March 8-10 May 11-13 June	18 Jan 14:00 15 Feb 14:00 30 March 14:00 10 May 14:00 13 June 14:00
R02	7-9 Feb 23-25 April 19-21 June	9 Feb 15:30 25 April 15:30 21 June 15:30
R03	21-23 Feb 16-18 May	23 Feb 16:30 18 May 16:30
R04	30-31 Jan 22-23 March 30-31 May	31 Jan 16:30 23 March 16:30 31 May 16:30
R05	1-2 March 18-19 April	2 March 16:30 19 April 16:30
R06	2-3 April 28-29 June	*16 April 13:30 *9 July 10:00

\* please note it is the individuals responsibility to book on the R06 exam directly with CII

## Residential facilities

Reed Business School has optional residential facilities for those requiring accommodation. Delegates attending on a non-residential basis will be provided with drinks and lunch. The residential option includes breakfast, lunch and an evening meal. We have 3 levels of accommodation; bronze, silver and gold.

Bronze - £30/night in a twin shared room

Silver - £45/night in a single room

Gold - £75/night in property with en-suite facilities (limited availability)

Our bronze and silver level accommodation is basic with shared bathroom facilities. All our rooms are serviced daily by our housekeeping team but do not offer the luxuries expected with a hotel; our rooms do not have TVs as we provide an environment dedicated to study with few distractions.

Our gold accommodation consists of accommodation with direct access to private bathroom facilities. These rooms are limited and are booked on a first come first serve basis.

We also hold a list of local hotels and B&B we can provide upon request for you to book directly.

## Course fees

Unit	Revision fees	Exam fees	
		CII member	Non-member
R01	£425	£110	£146
R02	£450	£110	£146
R03	£475	£66	£85
R04	£350	£66	£85
R05	£350	£60	£62
R06	£350	£131*	£167*

\*payable directly to CII

Please note all fees are subject to VAT at the standard rate

\*\*subject to availability

## Multiple booking discount

Book more than one paper at the same time and receive 10% discount on tuition fees per paper.

## Residential fees

Level of accommodation	Fee/night
Bronze	£30
Silver**	£45
Gold**	£75

## Course material

Pre-course guidance and condensed handouts will be provided as part of the course and the following material is also available for your course preparation. Please note it is expected you have purchased and read thoroughly the study text and accessed RevisionMate (on-line tool when purchasing study text) as a minimum for your course preparation.

	R01		R02		R03		R04		R05		R06	
	CII	Non CII	CII	Non CII	CII	Non CII	CII	Non CII	CII	Non CII	CII	Non CII
CII Membership												
Study text with updates (including RevisionMate)	£96	£134	£96	£134	£58	£75	£58	£75	£34	£41	£96	£134

### Revision aids

Audio revision MP3	£39	£42	£39	£42	£39	£42	£39	£42	£39	£42	£39	£42
Examination guide	£12	£13	£12	£13	£12	£13	£12	£13	£12	£13	£12	£13
Key fact booklet	£24	£26	£24	£26	£24	£26	£24	£26	£24	£26	£24	£26
**Question Pack 1	£24	£26	£24	£26	£24	£26	£24	£26	£24	£26		
**Question Pack 2	£24	£26	£24	£26								

Please note postage of £4.70+VAT will be added per order.

\* The content of the latest Examination guide is included FREE within the RevisionMate online study tool, provided with a study text purchase for this unit. When separately purchased, Examination guides are supplied as PDF files for you to print off as and when required for your own use.

\*\*The online question pack consists of six mock style exams (comprising a total of 300 questions), providing comprehensive exam practice that tests knowledge and develops technique.

“Great course and confidence building”

Mark Cummings  
Frank Corrigan & Co



# Enrolment Diploma in Regulated Financial Planning 2012

Surname

First name

Male  Female      Date of birth

Home address

Postcode

Tel      Mobile

Email

Emergency contact details

CII Pin No.(used to book the on-line exams)\*

Course fees to be paid by:  Student  Employer

Employer's name and address

Postcode

Tel      Fax

Email

**\* I have read and accept the terms of business within this brochure and the below on-line exam consent**

Student signature

Date

Have you studied at Reed Business School before?  Yes

How did you hear of Reed Business School?  
(e.g. website, recommendation, previous student)

Do you have any dietary requirements?

Vegetarian

No fish

Dairy free

Wheat free

Nut allergy

Vegan

Other

Please give details of 'other'

Preferred method of receiving course information from Reed

By post to home address

By post to work address

Email to work address

Email to private address

Other

Please give details of 'other'

**Please ask employer to sign below if paying your course fees**  
**Employer's authorisation for sponsored students**

As employers, we are responsible for the payment of fees due on receipt of the invoice, regarding the student mentioned opposite and will endeavour to inform you in writing of any change to this arrangement. We understand that we are fully responsible, in all circumstances, for the payment of fees due, including termination of employment or cancellation of course (unless Reed Business School is notified in writing at least 15 working days, before the relevant course commences)

Employer's signature

Please print

Employer's title

Date

**Methods of payment**

Please invoice my employer (if signed above)

I enclose a cheque for £  
made payable to: Reed Business School

Credit/debit card – please charge my credit/debit card in respect of the courses listed overleaf and any fees outstanding in respect of the Finance courses booked

Name on card

Cardholder's signature

Card No.

Valid from     Expiry date

Issue No. (If applicable)   Security No.

Statement address:



\* I hereby consent Reed Business School to access on-line examination results at the time and prior to completion of booking on-line examinations if booking on-line examinations with Reed Business School.

# Enrolment form

## CII Diploma in Regulated Financial Planning

Unit	Revision dates	Revision fees	Exam date	Exam fees			Total £
				CII member £	Non-CII member £		
R01	16-18 Jan	£425	18 Jan 14:00	£110	£146		
	13-15 Feb		15 Feb 14:00				
	28-30 March		30 March 14:00				
	8-10 May		10 May 14:00				
	11-13 June		13 June 14:00				
R02	7-9 Feb	£450	9 Feb 15:30	£110	£146		
	23-25 April		25 April 15:30				
	19-21 June		21 June 15:30				
R03	21-23 Feb	£475	23 Feb 16:30	£66	£85		
	16-18 May		18 May 16:30				
R04	30-31 Jan	£350	31 Jan 16:30	£66	£85		
	22-23 March		23 March 16:30				
	30-31 May		31 May 16:30				
R05	1-2 March	£350	2 March 16:30	£60	£62		
	18-19 April		19 April 16:30				
R06	2-3 April	£350	*16 April 13:30	£131*	£167*		
	28-29 June		*9 July 10:00				
						Total to carry down	

\* It is the delegates own responsibility to enter the national examination for R06

### Accommodation £

Level of accommodation	Complete dates accommodation is required	Total £
Bronze at £30/night (shared)		
Silver at £45/night (single)		
Gold at £75/night (en-suite)		
		Total to carry down

### Course Material

	R01	R02	R06	R01	R02	R06	R03	R04	R03	R04	R05	R05	Total £
CII Membership	✓	✓	✓	Non CII	✓	✓	✓	✓	Non CII	✓	✓	Non CII	✓
Study text with updates (inc. RevisionMate)	£96			£134			£58		£75		£34	£41	

### Revision aids

Audio revision MP3	£39			£42			£39		£42		£39	£42	
Examination guide	£12			£13			£12		£13		£12	£13	
Key fact booklet	£24			£26			£24		£26		£24	£26	
Question Pack 1	£24			£26			£24		£26		£24	£26	
Question Pack 2	£24			£26									
Postage per order													£4.70
												Total to carry down	
												<b>Total £</b>	

### Course fees

Multiple booking discount (see full terms and conditions) only applicable when booking more than one paper at same time	
Accommodation fees	
Sub-total	
VAT @ standard rate	
Course material	
Grand total	

## Terms and Conditions

### Payment

We can offer two types of payment method

#### 1. Full payment upon enrolment

All course fees including materials, tuition fees, examination fees and accommodation are payable upon enrolment no later than 15 days prior to the start of the first course.

#### 2. Instalment payment

Upon enrolment, all materials and postage must be paid with booking. This option is available when booking on more than one paper at the same time. Tuition, accommodation and examination fees will be invoiced in phases and must be paid no later than 15 working days previous to the first day of each course. A schedule of the instalment payment plan will be sent to you with the initial invoice.\*

\*Debit/credit card details must be provided at enrolment stage to pay by instalments.

#### Multiple booking discount

A 10% discount on tuition fees per paper is only applicable when booking on more than 1 paper at the same time. If paying by instalments the discount will be given on the final payment.

This discount can not be carried forward to later courses and is not available retrospectively.

#### Cancelling courses

All cancellations to bookings must be made in writing 15 working days prior to the start of the course. If a booking is cancelled within the 15 days or if the student fails to attend the course, the full course fee must be paid immediately.

### Deferring

If a student wishes to defer a booking to a later course within 15 working days of the original course start date, there will be an administrative charge of 25% of the course fee. If that booking is then cancelled at any time, the course fee remains payable.

### Amendment to Booking

An administrative charge of £10+VAT will be payable for each amendment requested to an existing booking. Refunds on credit card payments will be charged at the greater of 1.5% or £10 to cover transaction fees. If a refund is applicable an administration charge of £25.00 + VAT will be levied.

### On-line exams

Consent is granted to Reed Business School to access on-line examination results at the time and prior to completion of booking on-line examinations if booking on-line examinations with Reed Business School.

Any CII on-line exam system errors resulting in either examinations not being held at the designated date, venue or time or the unsuccessful completion of the on-line examinations are out of Reed Business School's control and Reed Business School shall not accept any liability in relation thereto.

Reed Business School reserves the right, in its sole discretion, to refuse to accept any booking

“Structured, informative and competent to a very high standard”

Michael Smith  
Belgrave Asset Management Ltd



Reed Business School,  
The Manor, Little Compton,  
Nr Moreton-in-Marsh  
Gloucestershire GL56 ORZ



# How to find us Reed Business School is situated in Little Compton, a picturesque & quiet village in the heart of the Cotswolds

## By rail

There is a main line station at Moreton-in-Marsh offering frequent intercity services to Oxford, Reading, London Paddington and Worcester/Hereford. The Business School is a 4 mile taxi journey away from the station.

## By road

The distances by road are... Oxford 25 miles A44  
Birmingham 45 miles M40 (J15), A429, A44  
London 80 miles M40 (J8), A40, A44  
Swindon 35 miles A361, A44.

The Chartered Insurance Institute  
42-48 High Road, South Woodford, London E18 2JP  
Tel 0208 989 8464 Fax 0208 530 3052  
Email [customer.serv@cii.co.uk](mailto:customer.serv@cii.co.uk) Web [www.cii.co.uk](http://www.cii.co.uk)

Tel **01608 674224** Fax **01608 674518** Email [rbs.reed@reed.co.uk](mailto:rbs.reed@reed.co.uk) Web [www.reedbusinessschool.co.uk](http://www.reedbusinessschool.co.uk)