

JULY EXAM PASSES

July saw the following members of staff pass their exams as follows: -

James Thompson (AF4) & Phil Rogers (AF3)

The Advanced Diploma in Financial Planning enables professional advisers to develop their specialist planning capabilities, providing clear differentiation from the main body of advisers. It builds on existing skills and develops knowledge gained through previous study and workplace training. It consolidates and advances work already undertaken, most typically in completing the Diploma in Financial Planning or the first completion level of the AFPC (both of which carry the designation DipPFS).

P04 - Alexa Johnson

The Diploma in Insurance is a technical and supervisory qualification for insurance staff working across all sectors of the industry (and the logical progression from the Certificate in Insurance). It provides a firm grounding in insurance fundamentals and will enable the individual to build towards advanced technical knowledge, thereby ensuring you have the means to function effectively in a challenging environment.

J01 - Ross Davies

The Diploma in Financial Planning develops advanced technical knowledge and understanding across a broad range of key advisory areas. Completion of the Diploma will enhance your technical knowledge, support regulatory compliance, help reduce risk and improve your career prospects. It provides an objective measurement of knowledge and understanding and will enhance client's confidence in the service provided.

J06 - Keith Pressler

The objective of this unit is to develop an understanding of investment products and the management of an investment portfolio.

Unit I CeMAP - Anja Ford

Anja who recently joined Taylor Patterson as an Administrator within the Financial Planning Department has successfully passed Unit I CeMAP Certificate and obtained a Merit Pass. The IFS CeMAP qualification is the Certificate in Mortgage Advice & Practice. This qualification is required for any individual who wishes to advise customers on mortgages. It comprises of three units, with the first being UK Financial Regulation. This unit focuses on the financial services environment and regulation.