

## CII Financial Planning Process (AF5) Study Day – April 2019 Exam

Sheffield CII (Life & Pensions Society) are pleased to offer a one day study programme in preparation for the April 2019 sitting of the AF5 (Financial Planning Process) exam, in association with Financial Adviser Academy.

- DATE**            **Wednesday 3<sup>rd</sup> April 2019**
- LOCATION**      Aviva Pomona Centre, Pear Street Sheffield.
- COST**            £125 including all course material

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

### 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](mailto: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.**