The Insurance Institute of Plymouth & Cornwall (referred to below as the “Institute”) is pleased to offer additional support (see also separate [Exam and Retake subsidies available](https://www.localinstitutes.cii.co.uk/plymouth-cornwall/home/about-us/subsidy-scheme/) for certain members) to further help local CII/PFS members succeed in their R0 unit studies and become practicing financial planners. This is achieved through:

* (*for all Institute members*) offering a member only exclusive 40% discount code specifically for use with training provider RM Advance for members to be able to purchase discounted digital learning packages, which also includes a live virtual exam revision session (instructions for purchase are as below);
* (*limited, so* ***only for those members who do not have access to such employer supported education and revision sessions or funding****).* A subsidy towards what you have paid for the above RM Advance learning package. Once the package has been purchased, the member can complete the form below in order to claim a refund for over half of this package cost (as shown in the Subsidy table below).

To apply for the subsidy, please complete the form below, attaching proof of purchase of the applicable R0 Unit Blended/Digital Learning Package with training provider RM Advance. This should then be sent by email to the Treasurer of the Institute. You will find contact details at [www.localinstitutes.cii.co.uk/plymouth-cornwall/home/about-us/contact-us/](https://www.localinstitutes.cii.co.uk/plymouth-cornwall/home/about-us/contact-us/)

|  |  |
| --- | --- |
| **Your Name (payment will be made payable to you)** | Click or tap here to enter text. |
| **We will pay by bank transfer. Please tell us your personal account name, account number and sort code** | Click or tap here to enter text. |
| **Your CII/PFS PIN Number** | Click or tap here to enter text. |
| **Name of R0 Unit/s package purchased** | Click or tap here to enter text. |
| **Date of Purchase** | Click or tap here to enter text. |
| **I have read the attached policy and confirm that I do not have access to an employer supported education programme and I agree to the other Terms and Conditions shown** | Yes  No  Date of agreement:  Click or tap here to enter text. |
| **Any additional notes e.g. name of employer** | Click or tap here to enter text. |
| **I have attached the relevant proof of purchase** | Yes  No |

**TERMS & CONDITIONS**

* 40% discount codes are available for use by all our local Institute members studying towards the R0 units, however the actual subsidy towards a refund is limited to individual CII/PFS members who do not have access to such employer supported education and revision sessions or funding;
* The subsidies as per the following table, when applicable to members, are available:

|  |  |
| --- | --- |
| **Diploma specific funding** | **Subsidy** |
| R01 Exam subsidy | £85 |
| R02 Exam Subsidy | £85 |
| R03 Exam Subsidy | £85 |
| R04 Exam subsidy | £85 |
| R05 Exam Subsidy | £85 |
| R06 Exam Subsidy | £85 |
| **Total** | £510 |

* The candidate will need to be a member of our 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 our local Institute for the term of their studies to receive the subsidies;
* Due to the size of the Institute and therefore amount of funds from CII, funding is limited to 24 applications maximum (either candidates or units) throughout the Presidential year (which starts and begins at AGM each year) and therefore also limited to a reasonable amount per financial planning practice (as agreed beforehand between the local PFS Professional Qualifications Officer and CII’s Education Officer – find us on the Contact Us page for discussion);
* Due to funding limitations, it is unlikely that there will be additional revision sessions run by the Institute. PFS CPD funding will be concentrated on subsidies support and introduction of RM Advance’s blended learning which provides more regular virtual exam revision sessions and mock exam support;
* There will be an intention by the candidate to complete the learning (including booking and attending a virtual exam revision session with RM Advance) contained in the R0 unit purchased from RM Advance within 12 months;
* The candidate should update CII’s Education Officer with relevant feedback on the studies including sitting/passing exams;
* The subsidy for a following R0 unit exam will only be provided when the previous R0 unit exam (for which you have claimed refund subsidy) has been passed;
* The Institute will review the level of subsidy if the costs of courses increase;
* The intention 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 Presidential year;
* The intention of the Institute is for the 40% discount code to be available over the term of your studies, however please note that the code is limited to a maximum of 250 uses until January 2022, at which stage the Institute will apply for a new code then and each year thereafter from RM Advance. Keep the code safe and it is not for distribution outside of the Institute. The code can be used multiple times by the same learner.

**Instructions for purchase of RM Advance learning material:**

* Visit <https://www.localinstitutes.cii.co.uk/plymouth-cornwall/home/events/2021/r0-support-for-plymouth-cornwall-insurance-institute-members/> now to register for your code. You will receive the code instantly by email. Alternatively you can contact [nat@thmarch.co.uk](mailto:nat@thmarch.co.uk) for the code;
* Next, go to [www.rmadvance.com/courses/](https://www.rmadvance.com/courses/)
* Choose the blended learning course from the range of R0 programmes, add the blended support option to the basket, then at checkout apply our special Institute discount code and a 40% discount will automatically apply;
* You will see that the booking system allows you to choose your own date for a virtual classroom revision session from a whole range of available dates, meaning you can take the revision session at a time that is right for you.

Here is a quick summary of what you get with the blended learning programme:

|  |
| --- |
| **R01 – R06 product range available**  Full digital programme (4-5 weeks of learning)  Access 24/7 to online learning portal  Videos  Reading content  Interactive e-learning  Weekly pre-recorded classroom washup sessions  Weekly exams  Full mock exams with instant feedback  Assignments with model answers  **Plus**  One full virtual classroom session to bring the full digital experience to life  With choice of up to 50 dates a year |

**We sincerely wish you the best of luck with your studies!**