Quilter
FinancialAdviser
School

What qualifications do I need to provide both financial & mortgage advice?

Diploma for Financial Advisers (DipFA®) and Certificate in Mortgage Advice and Practice (CeMAP®)

Our DipFA® and CeMAP® programme provides a rounded package of training for anyone looking to become a full financial adviser. On successful completion of the programme you will have gained two industry-recognised qualifications.

Overview

Through the DipFA® and CeMAP® training programme, you will achieve two professional qualifications from The London Institute of Banking and Finance (LIBF).

DipFA® is a prestigious, benchmark qualification that meets the standards required for those giving professional advice on retail investment products. It is recognised by the industry's regulator, the Financial Conduct Authority (FCA).

CeMAP® is designed to provide an extensive knowledge of the UK financial regulations on mortgage policy and practice, plus how to apply this as effective mortgage advice to your clients.

How is the training delivered?

- Unlimited access to bespoke online learning content accessible at a time convenient to you via our learning management system
- A virtual online environment enabling you to learn from the comfort of your home or workplace
- Dedicated trainer support via bi-weekly trainer surgeries and live virtual sessions
- You will be a member of a cohort throughout your studies

Cost

The maximum total cost for the combined CeMAP® and DipFA® programme is £7,000. Quilter Financial Planning firms are entitled to a discount.

This cost can differ depending on individual circumstances, so please get in touch with us to confirm the cost for you.

Format of the exam?

FSRE – FSRE Exam (2 hours)
Section A - 90 MCQs
Section B – 2 case studies 5 MCQs each
Pass mark 70%

AFA Coursework submission (30% of unit)
Max 4,000 words plus short answer questions
Pass mark 50%

AFA Final written examination (70% of unit)
3 hour written Suitability Report
Pass mark 50%

CeMAP® 2&3: CeMAP® 2 & 3 Exams (2 hours each)
CeMAP® 2 – 4 units – 100 MCQs

CeMAP® 3 – 6 case studies with 10 MCQs each

Pass mark 68% – 70% for both

What support is available?

- Bespoke online learning material
- Regular tests to evaluate your progress
- Membership to LIBF (MyLIBF) including exam bookings
- Value added resources to enhance your learning experience
- Guidance and knowledge provided by an experienced trainer

Length of study required

- DipFA® = 30 weeks
- CeMAP® 2&3 = 10 weeks
- Recommended 12 - 15 hours study per week

Do you have any questions or would you like us to contact you?

Call or email us on 0333 200 1716 or *QFASinfo@quilter.com*

To apply, register your interest at: ***www.careers.quilter.com/train-as-a-financial-adviser/register-your-interest/***

Application Process

Following the completion of your application form with the school, all applicants will be required to complete the following:

Online tests

- numerical reasoning (20 minutes allowed to complete the test)
- verbal reasoning (20 minutes allowed to complete the test

Online Assessments

- cognitive assessment (12 minutes allowed to complete the assessment)
- behavioural assessment (takes 10-15 minutes to complete)

Interview

You may be invited to attend an on-line interview including making a 15-minute presentation, which will test your communication, listening and interpersonal skills. The presentation topic will be provided in advance of the interview to give you the opportunity to research and prepare.

Finding you a role and sponsor

If you don't already work in a financial advice company, we may be able to help you to secure sponsorship during or after your studies, by introducing you to local adviser firms that may be looking for new talent.

Sponsorship

If you already work in a financial advice company which is willing to sponsor you and cover the cost of your studies, all you need to do is let us know the details when you fill in your application form.

Our application process - it's as simple as 1, 2, 3.

1 Submit your application form

2 Complete our on-line tests and assessments

3 Attend an on-line interview (if applicable)