Quilter Financial Adviser School

What qualification do I need to provide complex financial advice?

Level 6 Advanced Diploma in Financial Advice (Adv DipFA®)

Our Adv DipFA® programme builds on the Level 4 Diploma in Financial Advice (DipFA®) (or equivalent qualification) to equip you with the expertise you need to provide complex financial advice and planning services to clients.

Overview

The programme covers five modules that take you through to receiving your Advanced Diploma. You can complete as many units as you wish and can be completed in the order that is most relevant to you.

Module	*Assessment method*
Pension transfers	Final exam
Long term care and later life planning	Multiple choice exam
Managing investments	Video presentation and final exam
Taxation, trusts and tax compliance	Coursework and final exam
Financial planning in retirement	Assessed forum contributions, video presentation and timed assessment

How is the training delivered?

The training covers academic material, test questions, how to apply knowledge to written exams and specific exam preparation. We focus on bringing the technical content to life and relating things to the real world.

- Weekly trainer-led virtual classrooms by video conference (during work hours).
- A series of focused half-day virtual workshops, providing you with the skills and knowledge to prepare you ahead of submitting coursework and sitting final exams.
- Access to a wide range of online study materials, designed by experienced level 6 trainers and with a focus on interpretation and exam technique.
- Access to a level 6 trainer outside of the diarised sessions for queries and additional one to one support.
- Whilst attendance is not mandatory for every session we encourage all students to attend as many as possible.

Cost

The total cost for completing all modules is £6,750 and is paid for prior to each module commencing. The breakdown of costs is as follows:

- Pension transfers: **£1,500**
- Long term care and later life planning: **£1,500**
- Managing investments: **£1,250**
- Taxation, trusts and tax compliance: **£1,250**
- Financial planning in retirement: **£1,250**

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

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

Quilter22_0184/May 2022