

Qualifications

Currently Held	Remote Services	Technical
FPC 1	√	√
FPC 2	√	√
FPC 3	√	√
CF8 (Long Term Care Insurance)	√	√
CF9 (Pension Simplification)	√	√
CeMap (Certificate in Mortgage Advice and Practice)	√	√
MAQ (Mortgage Adviser Qualification)	√	
CF7 (Lifetime Mortgages Activities)	√	√
HR1 (Home Reversion Plans)	√	
ER1 (Equity Release)	√	
R01 (Financial Services, Regulation and Ethics)	√	
R05 (Financial Protection)	√	
G10 (Taxation and Trusts)	√	√
J01 (Taxation)	√	√
J02 (Trusts)	√	√
R03 (Personal Taxation)	√	
AF1 (Personal Tax and Trust Planning)		
R02 (Investment Principles & Risk)	√	
J06 (Investment Principles, Markets & Environment)	√	
G20 (Personal Investment Planning)	√	
J08 (Financial Planning Practice)		
AF5 (Financial Planning Process)	√	
H25 (Holistic Financial Planning)		
G60 (Pensions)	√	√
J04 (Pension Funding Options)		√
J05 (Pension Income Options)	√	√
AF3 (Pension Planning)		
R04 (Pensions and Retirement Planning)	√	
K10 (Retirement Options)		
K20 (Pension Investment Options)		
G30 (Business Financial Planning)	√	√
H15 (Supervision and Sales Management)	√	

STEP Diploma Unit: Administration of Estates		√
STEP Diploma Unit: Taxation of Trusts & Estates		√
Investment Management Certificate (DPM)		
CeRGI (Certificate of General Insurance)	√	
CeRCC (Certificate of Regulated Customer Care)	√	
CeRCH (Certificate in Regulated Complaint Handling)		
CIB Pension Paper		

Currently Held	Remote Services	Technical
Diploma for Financial Advisers (DipFA)	√	
Diploma in (Regulated) Financial Planning (DipPFS)	√	√
Advanced Financial Planning Certificate	√	
Chartered Financial Planner	√	
Fellow of PFS		
Financial Services Degree		
Business Studies Degree		√

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