FINANCIAL PLANNER LIFE ACADEMY

2023 PROSPECTUS

THE ACADEMY

Welcome to the Financial Planning Life Academy, a revolutionary training programme designed exclusively for aspiring personal finance professionals.

Our academy is committed to providing you with outstanding resources, state-of-the-art technology, and recruitment solutions that will help you thrive in your career.

Our programme covers a range of job roles, including Financial Planner, Paraplanner, Mortgage Adviser and Administrator and we have partnered with multi-award-winning NextGen Planners to bring you a comprehensive programme that will help you develop your skills and enhance your career in personal finance.

With the guidance of our experienced trainers and industry experts, you will gain a thorough understanding of the latest trends, tools, and techniques in the field.

We believe in nurturing a supportive community of like-minded individuals who are passionate about personal finance and committed to excellence. We will grow as you grow.

Qualifications aren't everything, so the FPL team, led by Sam Oakes and the wider Recruit UK business, will guide you through the process of marketing yourself so you can achieve your ideal position within the financial profession.

COURSE OPTIONS

1. **ADMINISTRATOR**
2. **MORTGAGE ADVISER**
3. **PARAPLANNER**
4. **FINANCIAL PLANNER**

We believe in offering a personalised learning experience, which is why our programme includes study support for industry-recognised exams. Our aim is to ensure that you are well-prepared to pass exams such as the CII regulated diploma in financial advice, the CII Certificate in Mortgage Advice, the CII Certificate in Paraplanning or the CII Certificate in Financial Services.

Our programme is fully inclusive providing a platform for people from all diversities and backgrounds to learn and grow in a supportive and independent environment. This is paired with our unique expertise, insight and connections in recruitment.

Join us today and become a part of a growing community of successful personal finance professionals.

COURSE OVERVIEW

Each course is built around developing the candidates' core technical knowledge, the skills required to be a financial planner, and the behaviours to create a sustainable career.

SKILLS

Traditionally, this area of learning in financial services was referred to as 'soft skills', but as the consumer and the profession has moved on, skills now need to be acquired across a much broader range. Our skills modules include communication techniques, negotiation, client acquisition and more.

KNOWLEDGE

We provide comprehensive study support for a wide range of exams which includes live virtual classroom days, weekly group tutorials, self guided video programmes, benchmark tests, sample exam papers, expert insights and more.

Our syllabus currently covers 14 exams and we are will be adding more as the academy evolves.

BEHAVIOURS

At the core of the course are the behavioural modules. Candidates are challenged to create their own ethical code of conduct and are shown how this can be embedded into behaviours that build trust rapidly. The gateway to a client focused, sustainable career.

1. Individual learning styles analysis
2. Skills, knowledge & behaviours modules
3. Extensive range of course material
4. A wide variety of Level 3 and 4 qualifications

COURSE STRUCTURE

At the beginning of the course the candidates complete a learning style analysis and identify their strengths and weaknesses. They can then select from an extensive range of course material to best suit their learning style.

The course is powered by the FPL Academy & supported by NextGen planners. We deploy a unique Study Less, Pass More methodology to ensure that each candidate makes the most efficient use of their time and maximises their chances of passing each module first time. Over the last 5 years, candidates have achieved over **90% first time pass rate** across all exam modules using this method.

DEVELOPING SKILLS & BEHAVIOURS

We have placed skills and behaviours at the heart of the FPL Academy to supercharge your employability.

The NextGen Planners Communication Skills Modules, which to date have seen over 700 delegates complete the course, have been included in full.

These modules focus on developing the skills required to plan and manage client meetings, rapidly build trust, understand your value proposition and deliver a first-class financial planning experience for the customer.

COURSE MODULES

STUDY LESS, PASS MORE METHODOLOGY

We have turned our experience of working with hundreds of candidates into a core methodology that helps candidates to spend their time in the most efficient way.

We blend knowledge sprint challenges with group tutorials, peer support groups, and virtual classroom days. All of these are supported by our Study Less, Pass More methodology which helps candidates to drop the inefficient study methods that don't serve them.

This is backed up with a comprehensive set of study materials including on-demand video, audio, sample exam papers, benchmarking question packs and so much more.

All programmes £19.99+VAT per month

Exam entry costs and CII workbook costs are paid by the candidate.

1 ADMINISTRATOR

- Career Advice and Mentoring
- Regular Exam Prep Online Classroom Days
- Weekly Group Tutorials
- Comprehensive Online Learning Support for CII R01 and LP2
- In-Person Regional Meetings
- Communication Skills Training
- Office 365 Training
- 5 Day Skills Challenges
- Knowledge Masterclasses
- Questions Forum

2 MORTGAGE ADVISER

- Career Advice and Mentoring
- Regular Exam Prep Online Classroom Days
- Weekly Group Tutorials
- Comprehensive Online Learning Support for CII CF1, CF6 and R05
- Client Meeting Skills Training
- Presentation Skills Training
- CPD in a Box
- Protection Products Training
- In-Person Regional Meetings
- Communication Skills Training
- Office 365 Training
- 5 Day Skills Challenges
- Knowledge Masterclasses
- Questions Forum

3 PARAPLANNER

- Career Advice and Mentoring
- Regular Exam Prep Online Classroom Days
- Weekly Group Tutorials
- Comprehensive Online Learning Support for CII CF1, CF6 and R05
- Cashflow Modelling Summer Camp
- Paraplanner Foundation Training
- CPD in a Box
- In-Person Regional Meetings
- Communication Skills Training
- Office 365 Training
- 5 Day Skills Challenges
- Knowledge Masterclasses
- Questions Forum

4 FINANCIAL PLANNER

- Career Advice and Mentoring
- Regular Exam Prep Online Classroom Days
- Weekly Group Tutorials
- Comprehensive Online Learning Support for CII R01, R02, R03, R04, R05 and R06
- Cashflow Modelling Summer Camp
- Financial Planning Tools and Techniques
- Client Meeting Skills Training
- Presentation Skills Training
- CPD in a Box
- Protection Products Training
- In-Person Regional Meetings
- Communication Skills Training
- Office 365 Training
- 5 Day Skills Challenges
- Knowledge Masterclasses
- Questions Forum

COURSE SCHEDULE

The Study Less, Pass More methodology means that candidates can spend their time as efficiently as possible. We recommend at least two, half hour revision sessions per day, five days a week and we have designed the content to support this. Developing this study habit will enable candidates to complete their chosen programme in the prescribed timescales.

Our programme is fully flexible so candidates wishing to complete sooner than the prescribed timescales can do so and those wishing to take a bit longer have the flexibility to pause and take breaks.

The soft skills and behavioural modules are scheduled so that they support the technical study modules. They also enable candidates to make a significant contribution to the business as early as possible, subject to each firm's own training and competency programme.

The skills you will learn in the FPL Academy will reap rewards, whether you’re an employee or you choose to set up your own financial planning firm.

NEXT STEPS

Candidates can start at any time and are in control of when they sit exams and only book the exam when they have successfully completed our benchmarking assessments.

There is so much more to the Financial Planner Life Academy than is covered here and because it is designed on a modular basis, as a careers based education, we can design bespoke packages to fit your needs.

The FPL Academy is the only fully independent financial planning academy. This means we are not tied to any one company and can advise across all roles within the financial profession, giving you a holistic, unbiased and comprehensive viewpoint. It’s suitable for those brand new to financial planning or those who want to take their next step outside of their current firm.

Ready to sign up? - Just click this <u>link</u> to get started!

MEET OTHER PROFESSIONALS

Don't just take our word for it! Listen to real life stories from other finance planning professionals about what it's really like to work in the world of financial planning, through the FPL podcast. Launched in 2020 by Sam Oakes (pictured below), with the aim of bringing the financial profession to life, find out all you need to know, directly from those who have lived experience!

Connect to Sam directly.

THE FPL PODCAST

Or watch our Founder Sam Oakes discussing the FPL Academy with Adam Owen, Director of NextGen Planners.....

The Financial Planner Life podcast is available on:

We are proud to join a small number of UK companies in our sector in being B Corp Certified. Download our 2022/3 Impact Report & discover how we are meeting high standards of social & environmental impact.

FP

FINANCIAL PLANNER LIFE ACADEMY

Click here to sign up now!

enquiries@financialplannerlife.com