

The CISI's Qualifications and Membership Framework

You can view the full list of qualifications at cisi.org/qualifications

UK Qualifications Levels	Foundation 2 3		Qualifying 3	Qualifying 4	Advanced 5	Postgraduate professional 6 7	
Wealth / Retail	Fundamentals of Financial Services	The Foundation Qualification - Introduction to Investment International Introduction to Investment	International Certificate in Wealth & Investment Management	Certificate in International Advanced Wealth Management		Certificate in Private Client Investment Advice & Management	Chartered Wealth Manager Qualification (Diploma in Wealth Management)
Financial Planning				Certificate in Paraplanning		Certificate in Advanced Financial Planning (Route to CFP™)	CERTIFIED FINANCIAL PLANNER (CFP™) (Diploma in Advanced Financial Planning)
Compliance / Risk			Combating Financial Crime		Certificate in Climate Risk	Diploma in Investment Compliance	
Operations			Investment Operations Certificate (IOC)	Managing Operational Risk in Financial Institutions		Diploma in Investment Operations	
Capital Markets / Corporate Finance			Capital Markets Programme	Level 4 Certificate in Investment Management		Diploma in Capital Markets	Diploma in Corporate Finance
Islamic Finance			Islamic Finance Qualification (IFQ)				
Green, Sustainable & Responsible Finance				Green & Sustainable Finance Certificate	Climate Risk Certificate		
European Qualifications Framework (EQF) ²	3	4	4	5	5	6	7

CFP™, CERTIFIED FINANCIAL PLANNER™ and  are certification marks owned outside the U.S. by Financial Planning Standards Board Ltd. Chartered Institute for Securities & Investment is the marks licensing authority for the CFP marks in the United Kingdom, through agreement with FPSB.

Do you have any questions about our qualifications? Get in touch.

customersupport@cisi.org +44 20 7645 0777 cisi.org/qualifications



@CISI



cisi.org/linkedin



[the_cisi](https://www.instagram.com/the_cisi)



cisi.org/youtube