The CISI's Qualifications Framework

CISI — CHARTERED INSTITUTE FOR SECURITIES & INVESTMENT

UK Qualifications Levels	Foundation 2	Foundation 3	Qualifying 3	Qualifying 4	Advanced 5	Postgraduate professional 6	7
Wealth / Retail			International Certificate in Wealth & Investment Management	Certificate in International Advanced Wealth Management / Investment Advice Diploma		Certificate in Pension Transfers & Planning Advice / Certificate in Private Client Investment Advice & Management	Chartered Wealth Manager Qualification (Diploma in Wealth Management)
Financial Planning				Certificate in Paraplanning / Investment Advice Diploma (Financial Planning & Advice)		Certificate in Pension Transfers & Planning Advice / Certificate in Advanced Financial Planning (Route to CFP™)	CERTIFIED FINANCIAL PLANNER (CFP™) (Diploma in Advanced Financial Planning)
Compliance / Risk			Combating Financial Crime / Global Financial Compliance / Risk in Financial Services		Certificate in Climate Risk	Diploma in Investment Compliance	
Operations			Investment Operations Certificate (IOC) / Technology in Investment Management	Managing Operational Risk in Financial Institutions		Diploma in Investment Operations	
Capital Markets / Corporate Finance			Capital Markets Programme / Certificate in Corporate Finance	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		

Foundation 2: Fundamentals of Financial Services

Foundation 3: The Foundation Qualification - Introduction to Investment / International Introduction to Investment

European Qualifications Framework (EQF)	3	4	4	5	5	6	7