

The CISI's Qualifications Framework

UK Qualifications Levels	Foundation		Qualifying	Qualifying		Advanced	Postgraduate professional		
	2	3	3	4		5	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		The Foundation Qualification - Introduction to Investment International Introduction to Investment		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	Fundamentals of Financial Services	Schools & Colleges Certificate for Introduction to Securities & Investment	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	Fundamentals of Islamic Banking & Finance		Islamic Finance Qualification (IFQ)						
Green, Sustainable & Responsible Finance						Green & Sustainable Finance Certificate		Climate Risk Certificate	
European Qualifications Framework (EQF)	3	4	4	5		5	6	7	