



The Assessment Programme 2011 REGISTRATION FORM

1. Candidate Information

First Name: _____ Title: _____
 Last Name: _____
 Job Title: _____
 Company/Organisation: _____
 Company Address: _____

 Town / City: _____ Postcode: _____
 Telephone: _____
 Email: _____
 IFP Member? Yes No* Membership No.: _____
 *Not a member? Join today for only £87.50 and take advantage of reduced rate course fees – **see below for details**

IFP Membership Offer

Join the IFP for only £87.50 and take advantage of the member course rates available (£87.50 for the first years membership, reduced from £175 plus a one off admin fee of £25)	<input type="checkbox"/> £87.50
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You must enclose copies of relevant examination certificates with this registration form to enable you to enter the assessment UNLESS you have previously sent copies to us.

2. Case study order

For your chosen case study you will be required to deal with three technical areas in detail. If you choose a pre-retired case study, one of the technical areas *must* be Personal Risk Management and Insurance. You must also briefly mention any other issues which are relevant to the clients.

The list below shows the technical areas that may arise in a pre-retired or retired case study:

Pre-Retired - typically covers:	Retired - typically covers:
Investment Planning	Investment Planning
Estate Planning	Estate Planning
Personal Retirement Planning	Educational Funding
Educational Funding	Special Needs
Tax Planning	Tax Planning
Personal Risk Management & Insurance (compulsory)	

Please select either a pre-retired or retired case study

	Candidate Rate
Pre-Retired case study	<input type="checkbox"/> £75.00
Retired case study	<input type="checkbox"/> £75.00

Total Amount Payable:	£
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3. Option 1 - 12-week home study options

Please note that you will have 12 weeks to submit your financial plan for assessment from the date the case study is despatched. The fee for the first assessment is £150.00. This should be paid on submission of your financial plan.

4. Option 2 – Assessment Session

	Select Date	Candidate rate
Assessment Session 2 days: the first assessment fee of £150.00 is included. Candidates will have to organise their own accommodation for the 2 day assessment session	<input type="checkbox"/> 28 & 29 Jun 2011 <input type="checkbox"/> 06 & 07 Sep 2011 <input type="checkbox"/> 08 & 09 Nov 2011	<input type="checkbox"/> £200.00

Total Amount Payable: £

Special Requirements

Do you have any special requirements to enable you to attend this event (e.g. diet, access etc)?

No Yes (please specify) _____

5. Payment

Total Amount Payable: £

CHEQUE I enclose a cheque made payable to **Institute of Financial Planning** for the **GRAND TOTAL** above

CARD Please debit my card for the **GRAND TOTAL** above. Please select card type:
 Mastercard Visa Visa Debit Maestro Other (Amex not accepted):

Name on card (as printed): _____

Card number: _____

Expiry date: _____

Issue no or 'valid from' date: _____

3 digit security no: _____

Card address - if different to the one already provided: _____

Signature: _____

5. Booking Terms & Conditions

Confirmation of registration and final details will be sent on receipt of your email or telephone call. Please note that a minimum attendance level is required for the events to take place and should this not be met we will inform all those who have registered, with an offer of alternative dates.

By checking this box you are agreeing to the Terms and Conditions of booking. The IFP strongly recommend that you read the booking terms and conditions as set out on the IFP website: www.financialplanning.org.uk. Alternatively a copy of these can be requested from the IFP office.

I confirm that I have read the CFP^{CM} handbook. A copy of these can be found within the on the IFP website http://www.financialplanning.org.uk/planners/financial_planning_preparation_day.cfm

Signed: _____ **Date:** _____

Please return completed to:

Qualification Department
Institute of Financial Planning
Whitefriars Centre, Lewins Mead, Bristol BS1 2NT
F: 0117 929 2214

E: enquiries@financialplanning.org.uk

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