ASHL ACADEMY

Flexible learning, endless possibilities.

THE ASHL ADVISER DEVELOPMENT ACADEMY

At ASHL we understand our part to play in the future of financial advice.

It is more apparent than ever that the current population of Financial Advisers is lacking youth, dynamism and diversity. We have listened to feedback from the membership which suggests that there is a growing need to deliver appropriate succession planning and exit strategies, to ensure the long-term security of your firm and your clients' future.

ASHL have partnered exclusively with NextGen Planners to design and deliver a training programme that is unique, bringing together the vision and industry leading compliance and support standards of the ASHL Group, together with the award-winning pedigree of NextGen Planners.

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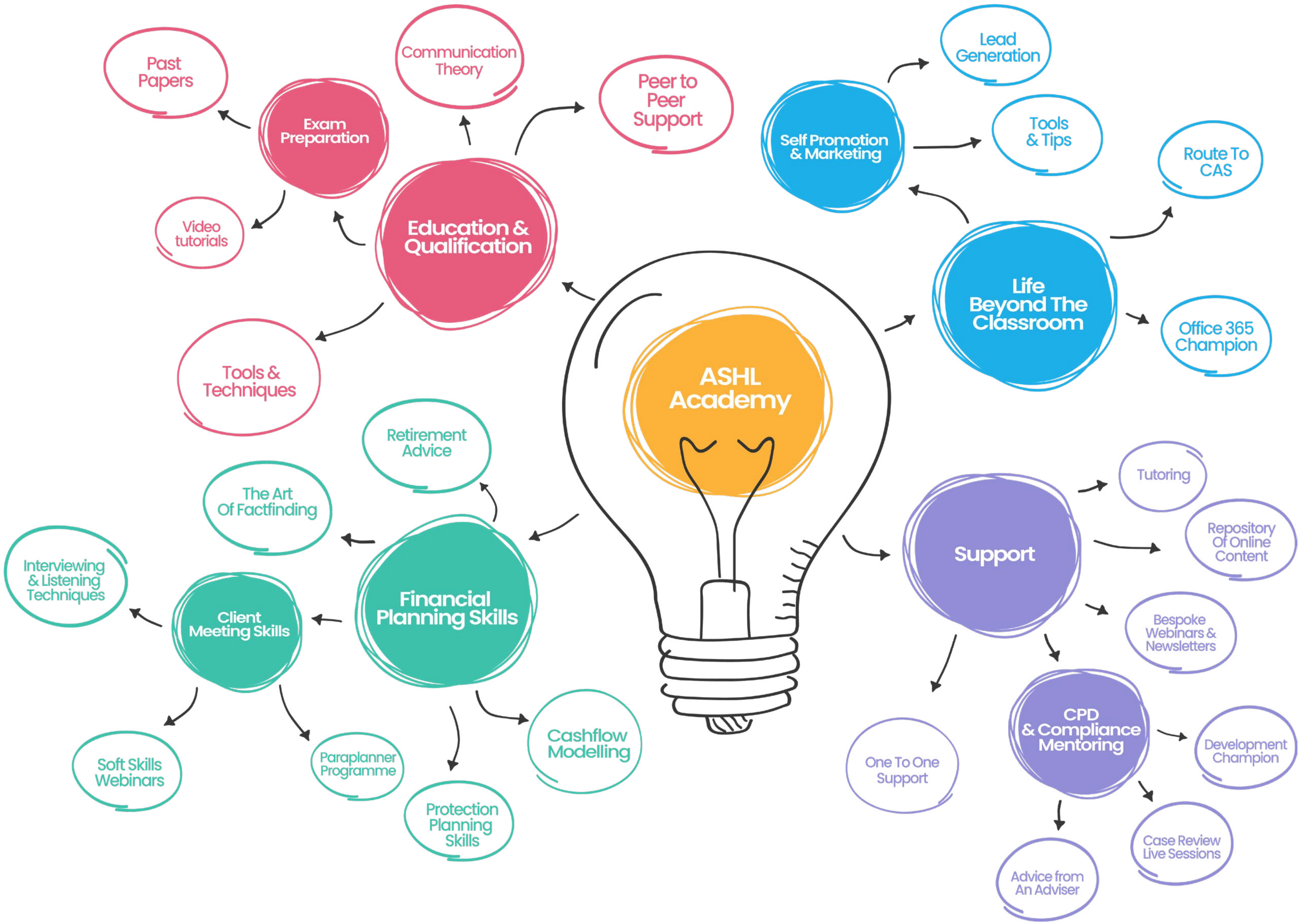
NEXTGEN PLANNERS

DEVELOPING SKILLS BEYOND THE CLASSROOM



FUTUREPROOF YOUR BUSINESS

This is an opportunity to protect your firm's business model within ASHL and to ensure succession planning and exit planning is completed. Our proven track record gives you the reassurance that the training given is of an industry leading standard. With practical skills and an accelerated route to competency, the Academy offers more than just the qualification.

Depending on the chosen route of your employee, you as the employer will be able to grow your business and benefit from the expertise of a qualfied and trained individual. Whether that's as an administrator, paraplanner or qualified Financial Adviser.

COURSE MODULES

Highest possible value delivered to candidates and employers.

Simple, sustainable pricing structure.

Courses starting throughout the year.

Administrator

Programme includes:

- R01 Exam support including on demand video programme, weekly group tutorials, virtual classroom days, knowledge check question banks.
- FA1 exam support including on demand video programme and knowledge check question banks.
- Microsoft 365 Champion Certificate - 6 modules

Paraplanner

10 virtual classroom days

- R01, R02, R03, R04, R05, R06
- Tutorial support covering J09
- 10 bespoke paraplanning modules
- Extensive on-demand content library
- 4 virtual classroom modules covering communication skills

Paraplanner to Adviser

7 virtual classroom days

- Communication theory & negotiation skills
- Extensive on-demand content library
- CPD Programme

Mortgage & Protection Adviser

3 virtual classroom days

- R01, CF6 and R05
- Extensive on-demand content library
- CPD Programme

Financial Planner Level 4

CII Level 4 Diploma in Regulated Financial Planning

or, CISI Investment Advice Diploma

or, LIBF Level 4 Diploma for Financial Advisers

\+ Communication theory & Negotiation Skills

\+ Extensive on-demand content library

Fast track to Level 4

10 virtual classroom days

- CII R01, R02, R03, R04, R05, R06
- Communication theory & Negotiation Skills
- Extensive on-demand content library

Bridging Programme Level 4-6

7 virtual classroom days

- CII AF1, AF4, AF5, AF8
- Advanced Communication theory
- Extensive on-demand content library

Chartered Level 6

17 virtual classroom days

- CII R01, R02, R03, R04, 405, R06 AF1, AF4, AF5, AF8
- Communication theory & Negotiation Skills
- Extensive on-demand content library

CII membership fee (optional), exam entries fee & learning materials not included

Study less **pass** more.

Our courses are underpinned by our 'Study Less Pass More' methodology, which helps candidates to drop inefficient study methods and optimise the learning process, blending knowledge sprint challenges with peer support groups, and virtual classroom days.

All of this is backed up with a comprehensive set of on-demand study materials. 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, maximising the chances of a first-time pass in each module.

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Sprint Challenges

A 30 day challenge where candidates follow a timetable, with the goal of passing an exam within 30 days.

Peer Support Groups

Group forums between candidates on the same course, designed to encourage peer to peer engagement.

Virtual Classrooms

Online sessions with a tutor, who will answer questions and help candidates understand anything they need further support with.

NEW FOR 2024/2025

We recognise the importance of completing qualifications in line with your experience and preferences and as such, we are agnostic as to which route to qualification you wish your candiate to take.

Our methodology is designed to enhance the learning journey, no matter which qualifications are chosen and we are therefore delighted that we can now offer the **LIBF** and **CISI** syllabi for Level 4 Financial Planning.

The choice is yours.

2024

LIBF Diploma for Financial Advisers

Recommended Study Time: 420 Hours

Modules:

Financial Services Regulation & Ethics (FSRE) (Multiple Choice Exam)

Advanced Financial Advice – Taxation (AFAT) (Multiple Choice Exam)

Advanced Financial Advice – Investments (AFAI) (Multiple Choice Exam)

Advanced Financial Advice – Protection (AFAP) (Multiple Choice Exam)

Advanced Financial Advice – Retirement Planning (AFAR) (Multiple Choice Exam)

Advanced Financial Advice – Course Work (AFAC) (Course Work Module)

Typical Completion Time:

9 months

Exam Entry Costs:

£1380

CISI Investment Advice Diploma

Recommended Study Time: 426 Hours

Modules:

UK Regulation and Professional Integrity (Multiple Choice Exam)

Investment Risk and Taxation (Multiple Choice Exam)

Financial Planning and Advice (Multiple Choice Exam)

Typical Completion Time:

9 months

Exam Entry Costs:

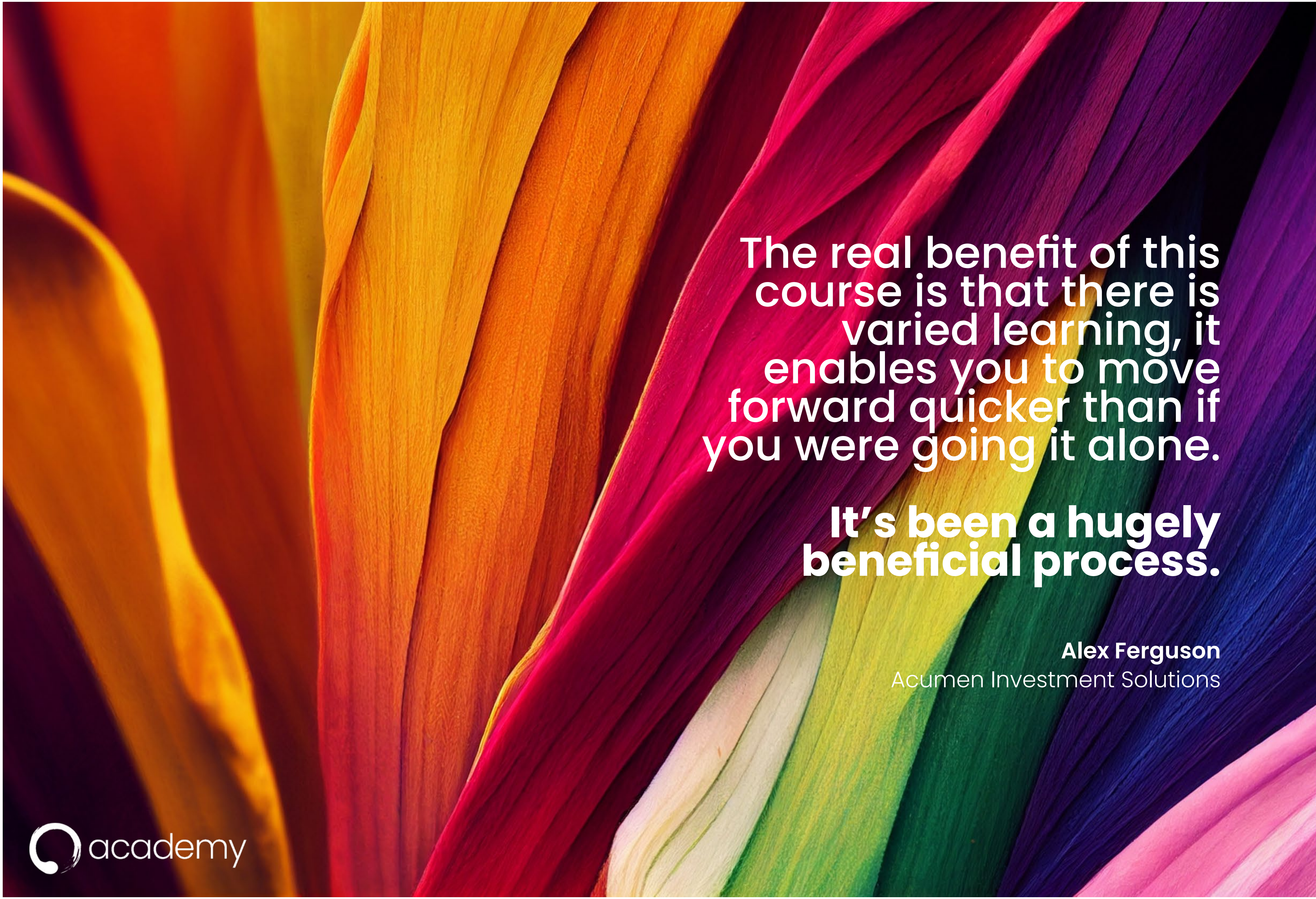
£795

2025

FIND OUT MORE...

Click the link below to find out what motivated The ASHL Group to set up the ASHL Academy, what the benefits are of collaborating with the leading UK Financial Services learning partners NextGen Planners and what's on the horizon for 2024 and beyond.

Watch now



The real benefit of this course is that there is varied learning, it enables you to move forward quicker than if you were going it alone.

It's been a hugely beneficial process.

Alex Ferguson
Acumen Investment Solutions

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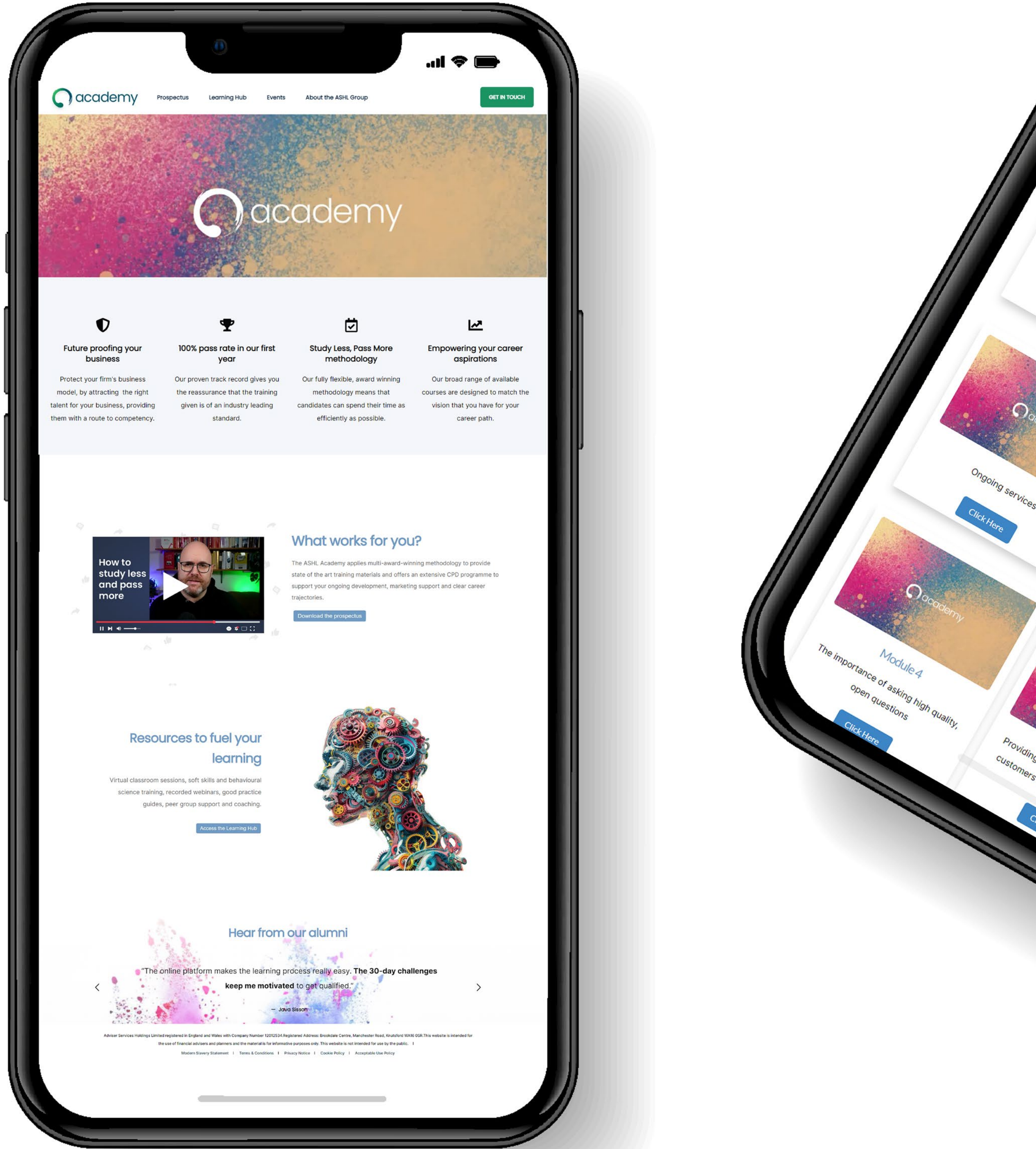
A WEALTH OF SUPPORT

Education doesn't end at graduation...

The next step in our roadmap to building lifelong career opportunities for Academy graduates is to provide them with the tools and the knowledge to actively and confidently advise their future clients.




Learning Hub
Welcome to the ASHL Academy Learning Hub. Here you can dive into a wealth of insightful webinar content designed to empower your professional and personal growth.
Core Modules
Business Development
Compliance & Regulation
iO
Product Help
Soft-Skills
Technology
Introduction to Mortgage Fraud
Click Here
ASHL financial crime training
Click Here
Complaints & ASHL processes
Click Here
Mortgage fraud protection
Click Here
Meeting the compliance challenge
Click Here
great support for vulnerable
in a Consumer Duty world
Transitioning from performance to wellbeing maximisation
Click Here

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.

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.

KNOWLEDGE & EXPERIENCE

We are confident that our sustainable methodology provides the technical foundations and the experience required for all Financial Planners, regardless of their choice of governing body.

FIRM COMMITMENTS

- The firm must commit to supporting the candidates, with all one-to-one support that they may require outside of the programme.
- The firm must commit to releasing the employee for the appropriate number of hours relating to training and exams.
- The firm must commit to the ongoing support and development of the trainee.

ASHL COMMITMENTS

- ASHL commits to supporting both the firm and the trainee whilst undertaking the training course.
- ASHL commits to ensuring that the course is relevant and up to date, ensuring that the course will add value to the firm and the trainee.
- ASHL commits to overseeing the delivery of the course, to ensure that the development of the trainee is completed and that any shortfall is rectified.

What do our graduates say?

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*The website, the CPD videos, the modules, **all brilliant!***

Kelly

***I love the ASHL Academy** for the video modules and classroom sessions.*

Claire

***It's really easy to revise on the fly**. It's ideal to be able to revise while grabbing a Maccies or a Starbucks, out on the road.*

Phillip

*For me the **bitesize videos are brilliant** and perfect for breaking down some of the more complex elements.*

Aaron

*The online platform makes the learning process **really easy**. The 30-day challenges keep me motivated to get qualified.*

Jaya

*The **recorded classroom days are very helpful**, they cover a great deal of content.*

Drew

Ready to go?

The programme is live, with onboarding happening throughout the year.

To register your interest in the ASHL Adviser Development training programme, powered by NextGen Planners, get in touch with us today on 01565 658 840, at academy@adviserservices.co.uk, or by searching @ASHLAcademy

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Prospectus

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Flexible learning, endless possibilities.

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