NEXTGEN PLANNERS TRAINING CONTRACT®

2023 PROSPECTUS

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At NextGen Planners, we do things differently, and in 2018 we embarked on designing the most comprehensive training programme available for people wanting to become financial planners.

Since then, over 500 people have joined the programme, working in firms who understand that they only generate value in their business if they focus on the needs of their clients and create sustainability.

The key to achieving this is recruiting, training and retaining people that think long term, focus on others, understand how to add value and have the technical ability to deliver.

Ultimately, the programme is designed to integrate with your current HR and L&D programmes, providing technical and soft skills training for your next generation of financial planners.

To celebrate the Training Contract's fifth year, we are launching a brand new option for firms with multiple candidates. The Unlimited Programme allows any of your staff access to any of our Level 3 and Level 4 exam modules and unlimited access to our skills programmes.

FIND OUT MORE:
WWW.NEXTGENPLANNERS.CO.UK

COURSE OPTIONS

The NextGen Planners Training Contract provides three options of training programme:

1. **FINANCIAL PLANNER** — **LEVEL 4** (16 month programme)
2. **BRIDGING PROGRAMME** — **LEVEL 4 TO 6** (12 month programme)
3. **UNLIMITED PROGRAMME** — **LEVEL 3 & 4**

Our multi-award winning program provides: regular face to face classroom sessions, online tutorials, virtual classrooms, comprehensive soft skills and behavioural science training, recorded webinars, good practice guides, support from our online community, and coaching.

Professional Adviser NEW TALENT AWARDS 2019 in partnership with architas	Professional Adviser AWARDS 2020	INVESTMENT WEEK INVESTMENT MARKETING AND INNOVATION AWARDS 2021
WINNER	**WINNER**	**WINNER**
Professional Adviser AWARDS 2021	Professional Adviser AWARDS 2022	Professional Adviser PA AWARDS 2023
WINNER	**WINNER**	**FINALIST**

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.

KNOWLEDGE

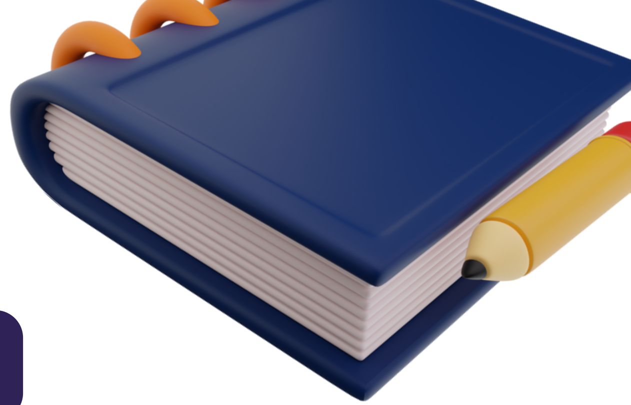
When designing this course, we considered all of the available Level 4 diploma and Level 6 advanced options provided by professional bodies.

We chose to work exclusively through the CII framework as we are confident that it provides the technical foundation required by all Financial Planners and is delivered through a sustainable membership model here in the UK.

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. The gateway to a client focused, sustainable career.

1. **Individual learning styles analysis**
2. **Skills, knowledge & Behaviours modules**
3. **Extensive range of course material**
4. **Level 3, 4 and 6 qualifications**



STRUCTURE

At the beginning of the course the candidates complete a learning style analysis and identify their strengths and weaknesses. They can then select from an extensive range of course material to best suit their learning style.

We deploy our unique Study Less Pass More methodology to ensure that the each candidate makes the most efficient use of their time and maximises their chances of a first time pass in each module and our candidates have achieved over 90% first time pass rate across all exam modules.

"The NextGen Planners Training Contract is a unique training programme which marries technical and soft skill competency. It is bought to you by phenomenal tutors and trainers.

From graduates to business owners, it is a great opportunity to expand your network in the profession through the classrooms which will likely grow into friendships and after work revision sessions"

CLÉMENCE CHATELIN

COURSE MODULES

DEVELOPING SKILLS & BEHAVIOURS

We have placed skills and behaviours at the heart of the NextGen Planners Training Contract. To do this, we have developed new content but also included our tried and tested modules.

The NextGen Planners Communication Skills Modules, which to date have seen over 700 delegates complete the course, have been included in full.

These modules focus on developing the skills required to plan and manage client meetings, rapidly build trust, understand your value proposition and deliver a first-class financial planning experience for the customer.

"I couldn't have completed my chartered exams without NextGen Planners."

CHANELLE PATTINSON

OUR METHODOLOGY:

STUDY LESS. PASS MORE.

We have turned our experience of working with hundreds of candidates into a core methodoligy that helps candidates to spend their time in the most efficient way.

We blend knowledge sprint challenges with group tutorials, peer support groups, and virtual classroom days. All of these are supported by our Study Less Pass More methodology which helps candidates to drop the inefficient study methods that don't serve them.

This is backed up with a comprehensive set of study materials including on-demand video, audio, sample exam papers, benchmaring question packs and so much more.

OUR COURSES:

1. FINANCIAL PLANNER

LEVEL 4

- 14 classroom days over 16 months
- CII R01, R02, R03, R04, R05, R06
- 1:1 Coaching
- Communication Theory & Negotiation Skills
- Financial Planning Foundation Skills
- Cash Flow Planning (Intermediate)
- Client Acquisition

£3,500 + VAT
per candidate

Plus NextGen Planners membership per candidate at £12.90+VAT per month

2. BRIDGING PROGRAMME

LEVEL 4 TO 6

- 10 classroom days over 16 months
- CII AF1, AF4, AF5, AF8
- 1:1 Coaching
- Advanced Communication Theory
- Advanced Financial Planning Skills

£2,000 + VAT
per candidate

Plus NextGen Planners membership per candidate at £12.90+VAT per month

3. UNLIMITED

LEVEL 3 & 4

Unlimited candidates can access any of our level 3 and level 4 exam programmes.

Including:

CII LP1, LP2, CF1, CF6, ER1, R01, R02, R03, R04, R05, R06, J07, J09, J10

PLUS! Unlimited access to the skills modules.

£500 + VAT
per month per firm

Plus NextGen Planners membership per candidate at £12.90+VAT per month

Minimum 12 month contract

COURSE SCHEDULE

Our Study Less Pass More methodology means that candidates can spend their time as efficiently as possible. We recommend two, half hour, revision sessions per day, five days a week and we have designed the content to support this. . Developing this study habit will enable candidates to complete their chosen programme in the prescribed timescales.

Our programme is fully flexible so candidates wishing to complete sooner than the prescribed timescales can do so and those wishing to take a bit longer have the flexibility to pause and take breaks.

Candidates can start at any time and are in control of when they sit exams and only book the exam when they have successfully completed our benchmarking assessments.

The soft skills and behavioural modules are scheduled so that they support the technical study modules, and also enable candidates to make a significant contribution to the business as early as possible, subject to each firm's own training and competency programme.

"The NextGen Planners Training Contract has been truly invaluable. It is safe to say I would not have been able to pass my exam without it. The support provided is so well structured that you can go into each exam so confident that you have done enough.

The best thing, however, is that if you're worried about anything at all you can always speak to the team and your peers about anything"

DANIEL MARTIN

FAQS

WHY SHOULD I USE THIS TRAINING?

The NextGen Planners Training Contract is designed to provide everything an employer needs to take a high quality recruit and development their skills, knowledge and behaviours to full competence as a financial planner. Through careful assessment and planning, we tailor each personal development plan to meet the needs of the candidate and the business that employs them. The course is designed and delivered by learning and development specialists who have trained thousands of financial services professionals, and who care deeply about developing the next generation of professional talent.

IS IT JUST FOR GRADUATES?

There is no minimum entry criteria for the NextGen Planners Training Contract. We will complete an assessment of each candidate prior to enrolment to ensure that they receive bespoke support tailored to their needs.

WHAT COMMITMENT IS EXPECTED FROM THE EMPLOYER?

We provide 14 classroom days during the Financial Planner level 4 course (20 for the level 6 Financial Planner). To get the best results, it is expected that employers will support candidates in attending these days, as well as releasing candidates to attend the regular virtual classroom sessions, webinars, tutorials and other live content. Outside of this time, the candidate will be working in the business and will be subject to the employer's own T&C programme.

WHAT IF MY EMPLOYEE LEAVES DURING THE TRAINING CONTRACT?

Due to the linear nature of the course, if an employee leaves at any time prior to completion, we cannot offer a place to a substitute candidate. As a result, the full balancing cost of the course minus any study materials or exam entries not already paid for will be invoiced.

WHEN CAN I SEE THE FULL COURSE SCHEDULE?

Once you have registered your interest we arrange a zoom chat with our Head of Content and course lead Adam Owen. He will discuss your candidates' individual course schedule.

WHAT HAPPENS AT THE END OF THE COURSE?

At the end of the course, most candidates will have passed all of the exams, completed the skills and behaviours elements, and will be assessed as competent financial planners at either level 4 or level 6. They will therefore be in a position to apply for a statement of professional standing.

WHAT IF I DON'T PASS AN EXAM FIRST TIME?

We have a tried and tested formula for the CII R0 and AF qualifications, and if candidates follow our process and commit the time needed to study the syllabus, we believe that we can achieve a very high percentage first time pass rate with each cohort. The course fee includes one exam entry fee for each exam. The cost of resits will be met by either the employer or the candidate. Each course has time built in, just in case a resit is required.

DO YOU ONLY SUPPORT CII EXAMS?

The NextGen Planners Training Contract focuses on CII exams as they are the most widely used and recognised in the profession. However, we also provide support for the CISI CFP Examinations free to members of NextGen Planners. If you are interested in becoming a CFP Professional book a call via our website.

WHAT IF MY CANDIDATE ALREADY HAS SOME OF THE QUALIFICATIONS?

Each candidate has their own personal development plan so we can adjust their timetable to reflect any qualifications they may already have. We will also adjust the cost of the course to reflect the fact that we won't be paying for study materials and exam entry for those qualifications already achieved. If your candidate already has all of the qualifications they need we have an alternative programme of skills and behaviours courses that you may want to consider.

HOW MUCH OF THE COURSE IS DEDICATED TO PASSING EXAMS?

There is no getting away from the fact that in order to become a financial planner, you need a licence to trade and that comes in the shape of an SPS from a professional body. Therefore, the course is designed to help candidates pass each of the exams first time. However, we believe that technical knowledge is just the foundation in becoming a great financial planner so the course focuses heavily on skills and behaviours, with virtual classroom sessions, as well as podcasts, and webinars.

WHAT IF I HAVE TO TAKE TIME OFF?

We understand that there will be times when candidates won't be available and we will do everything possible to accommodate extended periods of absence.

NEXTGEN PLANNERS

DESIGNED BY PLANNERS FOR PLANNERS

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www.nextgenplanners.co.uk