Five-Year Programme Structure



Year 1 (DipPFS)	Year 2 (2 AF papers)	Year 3 (2 AF papers)	Year 4 (Chartered)	Year 5 (Certified)
0 – 3 months: Admin Support 3 – 12 months: Financial planning team full time, admin and basic reports, assisting planners DFA Conference Introduction to Committees	Greater client interaction, presenting financial plans, attending more client meetings. Working as designated supporting financial planner for a set of clients. Continued project work	Graduate to start to lead own development. Begin CF30 training process with the aim of CF30 sign off by the end of the third year Significant meeting involvement.	Graduate to really lead their role. Start to lead some client relationships and build a client book Consider choosing a specialism. Lead client meetings.	Capabilities to determine development. Increase lead of client relationships. Start to take on more substantial clients of your own.
Operational Project	project work			