Canaccord Genuity Wealth Management

WEALTH PLANNING

Academy

Your path to success starts here

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Welcome to the CGWM Wealth Planning Academy

Take the next step on your career journey

The CGWM Wealth Planning Academy is a flexible training programme designed to offer the tools, support and expertise you need to progress and flourish in your career.

The programme is open to all colleagues, and you can join wherever you're at on your wealth planning journey – and wherever you want to get to.

There are no rigid timelines or set goals – just a personalised action plan based on your experience and the end result you wish to achieve.

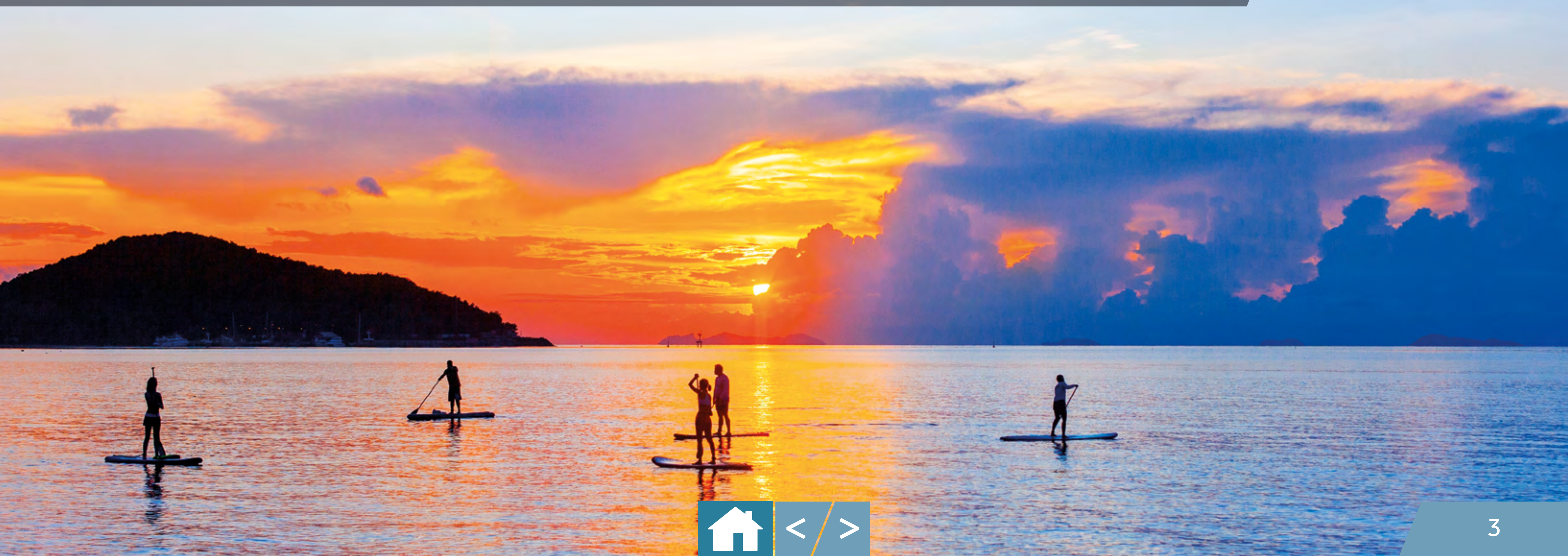
And with all the support you need to help you get there – such as paid study leave, qualification support, hands-on experience and personalised advice from senior colleagues – it's an invaluable opportunity to take your career to the next level.

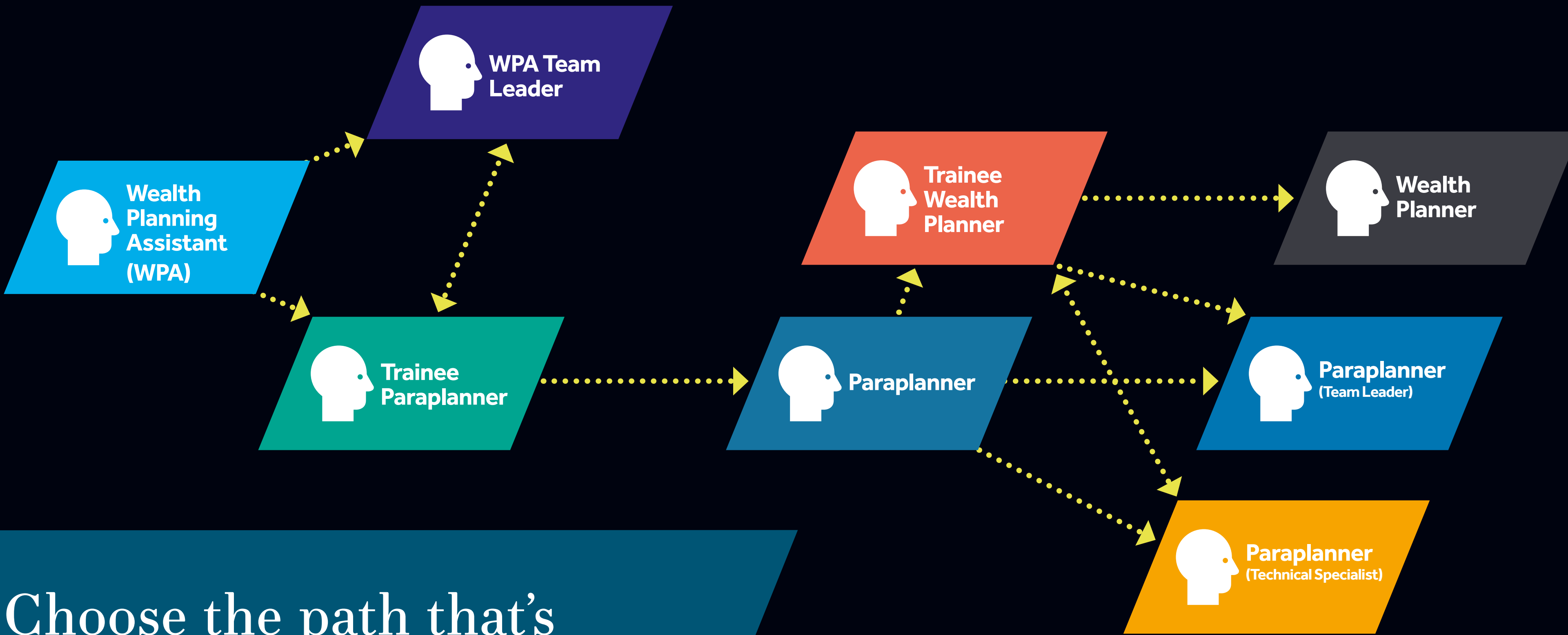
Benefits of the CGWM Wealth Planning Academy

- The programme is tailored to you, based on your skills, experience and aspirations
- Training is primarily on the job
- Bitesize technical training sessions focus on different areas of financial planning
- You can work towards the Regulated Diploma in Financial Planning and, where appropriate, on to Chartered qualifications.

Paul Simons,
Regional Head of
Wealth Planning
(South)

"The Academy is bringing employees of all backgrounds together, in an inclusive and welcoming programme that seeks to create the blueprint for a loyal, forward-thinking workforce. A workforce that will, as a result, attract new talent, ensure our existing staff are given the opportunity to be the best version of themselves professionally and personally, and set CGWM apart as an employer of excellence."





Choose the path that's right for you

Whether you're not yet working in wealth planning, or you're already on your journey, the Academy is the key to reaching your goal.

You set the path you wish to follow, and your progression is entirely based on your own individual skill set and aspirations.

Perhaps you aspire to be a Wealth Planner. Or maybe paraplanning is the aim? Whatever you choose, the CGWM Wealth Planning Academy can help you achieve it.

Did you know?

It can take as little as five years to become a Wealth Planner.

Jag Singh,
Trainee Wealth
Planner

"Having already benefitted from the development structure and opportunities that exist organically within CGWM's Wealth Planning department, I am excited to see how the Wealth Planning Academy can enhance this process by providing a more formal structure and path. There is already growing support for this initiative from the wider company: not just from other Planners and Paraplanners, but from the administrators, Compliance and the HR team."

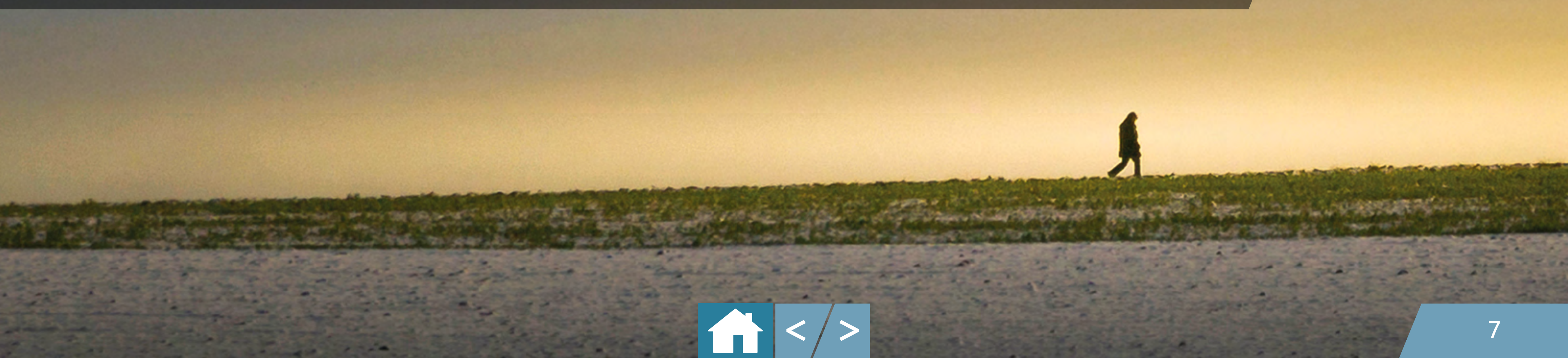
Support for your professional qualifications

At every stage of your journey, we'll provide the support you need to achieve the relevant qualifications. This includes access to resources such as study manuals and revision aids, as well as paid leave for study time and exams. And the further your individual pathway takes you, the more support you get.

Khaled Miah,
Trainee Wealth
Planner

"I joined CGWM as a Paraplanner in 2014. I started to better understand the technical side to wealth planning as I was learning on the job, and undertook level four exams to complement my technical knowledge. After gaining a CII Diploma, I knew I wanted to become a Wealth Planner and undertook level six exams, eventually attaining CII Chartered status and achieving my goal.

The company paid for all my qualifications and gave me study leave. I also had help from colleagues who have either completed the exams or had a similar route to becoming an adviser, and guidance from senior colleagues."



FAQs

Is the Academy open for all?

Yes, it is open to both existing and new staff, and is there to invest in building an individual's skills and career within CGWM.

Are professional qualifications compulsory?

No, the programme is aimed at developing one's skills and experience. However, for those wishing to move into paraplanning or wealth planning, gaining professional qualifications is a requirement.

How do I learn more about the Academy?

Details of the Academy and the available programmes are available from HR, on Engage and via your manager. Your manager will also form your main point of contact throughout your time in the Academy.

How will the Academy training be delivered to me?

A tailored programme will be developed and put in place for you by your manager, with oversight from the Training and Competence Manager. The content will be delivered through a mix of internal and external training, workshops, reading material and professional qualifications (for those wishing to progress to paraplanning and wealth planning).

How will my progress be assessed?

Your progress will form part of your regular personal development reviews with your manager.

Do I have to use the Chartered Insurance Institute (CII)?

At present, the CII is our preferred and recognised pathway. If you have qualifications with the Chartered Institute for Securities and Investments (CISI) already, individual guidance will be given.

Is there a time limit set for each stage of my programme?

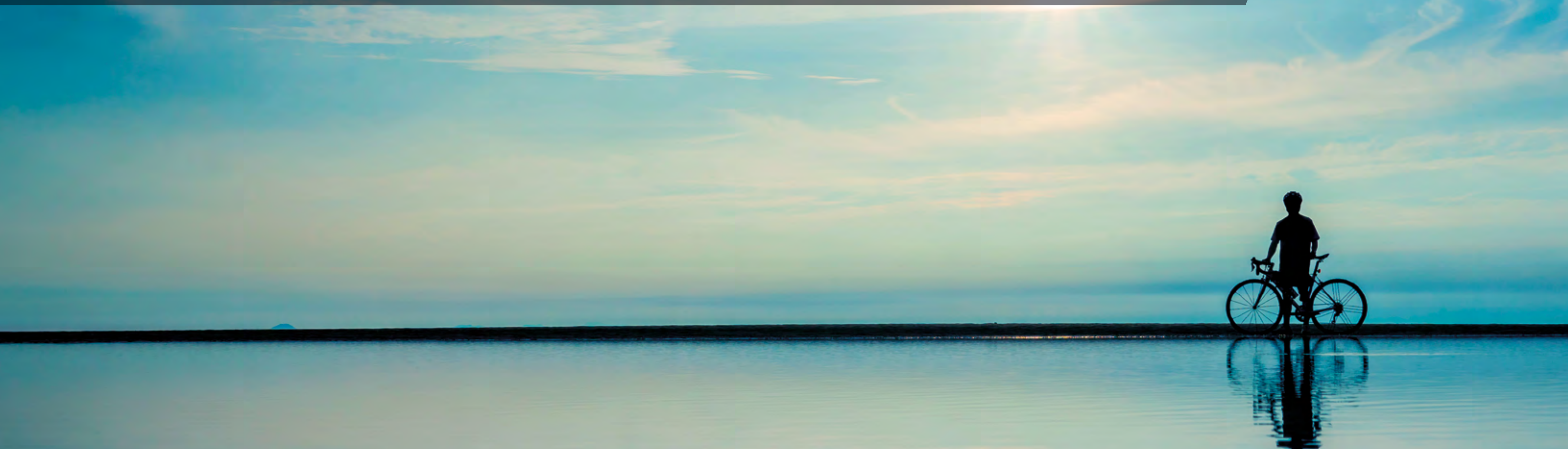
In short, no. We will provide you with a suggested guideline for time spent at each stage. However, you should progress at the pace you and your manager feel is most comfortable for you, based on your knowledge and experience level.

Can I pause or leave the Academy programme?

The Academy is designed to support your development as an individual. If you wish to pause your programme for any reason, at any time, this can be discussed and organised with your manager.

Paul Simons, Regional Head of Wealth Planning (South)

I'm proud of what the Academy offers our employees. I started my own career in administration, having built my way up through paraplanning and wealth planning over the last 15 years, before becoming a team leader, and now working as the Regional Head of Wealth Planning for the South. Throughout this journey, I've experienced first-hand how a quality employer, who supports and nurtures your skill set, is vital to success.



To sign up to the Wealth Planning Academy, and to find out more, contact the HR team at **CGWMUKacademy@canaccord.com**