

# Award in Bancassurance



## What is the Award in Bancassurance?

This qualification is an important first step in developing your career in bancassurance. It provides an introduction to bancassurance and its core financial, life assurance and insurance products. It also introduces you to how to identify clients needs, the importance of the client 'fact find' and ethical behaviour.

You don't need any other qualifications or prior knowledge of financial services or bancassurance to study for this qualification.

## Who should study the qualification?

The broad introduction on this qualification makes it suitable for a range of individuals:

### New to Financial Services

This qualification is a perfect entry point for school leavers or those just beginning their career to look at offering bancassurance services.

### New to bancassurance

If you are already a financial adviser or an insurance agent wanting to get a basic bancassurance knowledge, this qualification can lead to further areas of study or practice in this area.

### Firms looking to increase skills

Firms wishing to increase their staff knowledge in this area could also use this qualification in induction materials.

## Key features

- **Globally-recognised qualification** - awarded by the CII, delivered in partnership with the CISI in Africa
- **Prepare for a career in bancassurance or insurance** - this qualification provides an overview of the sector and will help kick start your career
- **Available to all** - there are no entry requirements
- **A fast and affordable recognition** - requiring only 60 study hours, the qualification can be achieved in a short time frame and successful completion will demonstrate your commitment to your profession
- **Access to higher level qualifications** - successful candidates can build on this qualification and progress to high level qualifications
- **Free CISI Student membership** - become associated with a globally recognised Chartered professional body. Join over 45,000 members globally and take advantage of an extensive range of benefits on offer

### Awarding Body



Chartered  
Insurance  
Institute

### Distributed by

**CISI**

CHARTERED INSTITUTE FOR  
SECURITIES & INVESTMENT

## Syllabus

- The financial services and insurance and the Bancassurance sector
- The main insurance products
- Savings and investment products
- Retirement planning products
- The importance of the client fact find and how to identify client needs
- What constitutes good and ethical client practice

## Studying for this qualification

60 hours of study is required for this exam. You can choose to self-study for the exam using the pdf workbook and elearning practice questions (Revision Express) or choose to have formal training with one our Accredited Training Partners (ATP). To find a training provider near you, visit [cisi.org/atp](https://cisi.org/atp)

The CISI requires all candidates to purchase the most up to date pdf workbook when booking the exam. When you register for this exam you will receive a copy of the PDF workbook and access to Revision Express.

## Assessment

The qualification is completed by passing a two-hour exam of 75 multiple-choice questions. The exam is delivered by Computer Based Testing (CBT). A network of test centres is available in Africa, ensuring flexible scheduling, instant results and ease of completing the exam on screen. Visit [cisi.org/cbt](https://cisi.org/cbt) to find your nearest venue.

## How to register

Register for your exam:

Visit [cisi.org/prices](https://cisi.org/prices) for current prices

online – [cisi.org/bancassurance](https://cisi.org/bancassurance)

by phone – +254 711 400994

via email – [cisi.kenya@cisi.org](mailto:cisi.kenya@cisi.org)

## Next steps

Both the CISI and the CII offer a range of qualifications and membership opportunities to suit those aspiring to work in the sector, right through to the most experienced professionals. After successfully completing this qualification, you are eligible to join the CISI at Affiliate level. CISI membership can support you throughout your career and help you demonstrate professional excellence.

To further your theoretical and practical knowledge higher level CISI qualifications can be taken.

Visit [cisi.org/qualifications](https://cisi.org/qualifications) for your next steps or for other CII qualifications please see [cii.co.uk](https://cii.co.uk)

CISI membership enables you to develop your career, increase your competence and maintain the highest standards of professional integrity. Our programme of free professional benefits assists you to keep up to date with the financial services sector.

## About the CISI

The Chartered Institute for Securities & Investment (CISI) is the leading professional body for securities, investment, wealth and financial planning professionals. Formed in 1992 by London Stock Exchange practitioners, we have a global community of over 45,000 members in 104 countries. [cisi.org/africa](https://cisi.org/africa)

Please contact us for further information on CISI qualifications and membership or to register:

[cisi.org/bancassurance](https://cisi.org/bancassurance)

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