

**Application for Accreditation of Prior Learning (APL)**  
**Application for Recognition of Prior Learning (RPL)**



Name:		PMI Number (if applicable)	
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Correspondence Address:

email address:

Contact number:

Please give details of the professional qualification(s) obtained (that you are requesting exemption for):

Name and Address of Awarding Body/Institute	Title of Qualification	Date Awarded

If you have a degree (or higher) then please state below:

Name and Address of Awarding Body/Institute	Title of Qualification	Date Awarded

Details of PMI modules you wish to claim exemption from?	
Unit	Unit Title

Declaration: I hereby apply and declare that all the information given on this form is correct:

Signed: \_\_\_\_\_ Date: \_\_\_\_\_

When completed please send this form to:

Vanessa Jackson, Manager Lifelong Learning and Qualifications  
Pensions Management Institute  
Tower 42, 25 Old Broad Street  
London EC2N 1HQ

Telephone: 02072471452  
email: [vjackson@pensions-pmi.org.uk](mailto:vjackson@pensions-pmi.org.uk)  
Web: [www.pensions-pmi.org.uk](http://www.pensions-pmi.org.uk)

Notes:

1. Please refer to the automatic exemptions on the attached sheet
2. Applications can be made when applying for PMI Membership or any time afterwards.
3. Original certificates or photocopies which are certified as true copies of the original by their employer must be provided.
4. Credits will not be granted on the basis of partly completed professional qualifications or on the basis of experience alone.
5. It is not possible to apply for credit from a unit that has been previously failed.
6. If you have qualifications which are not recognised by the PMI for automatic exemption (as per the sheet attached), then the process of APL/RPL is chargeable at **£240 per unit** as we will have to map claimed qualifications against existing qualification content.
7. A degree will automatically exempt you from one unit of the Tier 2 modules of ADRP.\*
8. A Masters Degree or Higher will automatically exempt you from two units of the Tier 2 modules of ADRP.\*
9. All APL/RPL awards are discretionary and at the behest of the PMI and are non-negotiable.

\*as long as it is in a finance related field and there is considerable overlap

This is a list of qualifications that are encountered most frequently. It is not an exhaustive list and qualifications not listed may be eligible for credit. Please contact PMI in these cases.

Awarding Body	Credits
<p><b>Actuarial Qualifications</b></p> <p>Fellows and Associates by examination of the Institute and Faculty of Actuaries (or equivalent)</p>	<p>Core Units 1A - 4</p>
<p><b>Accountancy Qualifications</b></p> <p>Institute of Chartered Accountants in England and Wales (and Scottish and Irish equivalents), Chartered Association of Certified Accountants, Chartered Institute of Management Accountants, Chartered Institute of Public Finance and Accountancy</p>	<p>Core Units 1A, 2 and 4</p>
<p><b>Chartered Insurance Institute (CII)</b></p> <p>All Fellows All Associates (Prior to 2004) Advanced Diploma in Financial Planning*</p> <p>Diploma in Financial Planning/Regulated Financial Planning*</p>	<p>Core Units 1A-3</p> <p>Core Units 1A-3 + Taxation, Retail Investment and Pensions</p> <p>Core Units 1A and 2 + Taxation, Retail Investment and Pensions</p>
<p><b>The Chartered Institute for Securities &amp; Investment (CISI)</b></p> <p>Investment Advice Certificate (<b>IAC</b>)</p> <p>Investment Advice Diploma (<b>IAD</b>)</p>	<p>Core Unit 4 &amp; Taxation, Retail Investment and Pensions</p>
<p>Qualified Solicitor or Barrister</p>	<p>Core Units 1A-3</p>
<p>Post-graduate Diploma in Legal Practice/Legal Practice Course</p>	<p>Core Unit 2</p>
<p><b>CFA UK</b></p> <p>Investment Management Certificate</p>	<p>Core Unit 4</p>

\*Depends on CPD requirements

June 2020