



Strategi
Institute

12 September 2021

B Magellan
4/1036 Colombo Street
St Albans
Christchurch 8014

Dear Brian

Congratulations on successfully completing the **Core strand V2** course, part of the New Zealand Certificate in Financial Services (Level 5) V2:

Your passing of the following unit standards has been recorded with the New Zealand Qualifications Authority:

- 31855: Demonstrate and apply knowledge of financial services legislation, good conduct, professionalism, and Six Step Process
- 31856: Demonstrate and apply knowledge of the financial services sector to provide financial advice solutions
- 31857: Demonstrate and apply knowledge of key factors in the economic environment to provide financial advice solutions
- 31858: Interpret and explain provisions in the regulatory framework in a financial advice services context

Strategi Institute offers the full range of courses required to complete the New Zealand Certificate in Financial Services (Level 5) V2.

In addition, Strategi Institute provides continuing professional development training for the financial services industry via its online learning platform Radar.

We are also able to offer, through Strategi Limited, a number of business support services to the financial services industry such as best practice compliance packages, website development and portfolio construction.

Please contact us if you would like information on any of the other courses or services, we can provide to support you in your business.

If you have any feedback or other suggestions for improvement that you have not already communicated to us or if you have any questions or queries relating to your recent course at Strategi Institute, please contact us by email info@strategi.ac.nz or by phone 09 414 1300.

Thank you for choosing Strategi Institute as your course provider. We trust you found the course beneficial and enjoyed your time studying with us.

We look forward to helping you again in the future.

Kind regards,



Daniel Relf BBUs, BA

Chief Executive Officer

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