

Technical Advisor Agreement

The Technical Advisor for a specified examination will be identified as a leading support to the Examinations Manager on technical or industry-based queries to ensure the accuracy and relevance of the examination. A modest annual honorarium of £200 is attached to this role. This is an invited role and will be reviewed every two years to ensure a healthy rotation of practitioner input.

General Responsibilities

The Technical Advisor will be requested to support the SII in the following ways:

1. To support the Examinations Manager with occasional examination related issues (for example on syllabus developments, exam questions or study material).
2. To offer advice and guidance on industry changes that may affect the examination.
3. To be willing to publicly support the examination and its use by the industry (for example through attributed quotations).
4. To occasionally offer advice and guidance in the case of candidate queries, complaints or appeals (typically one or two times per year).
5. To assist the SII in the development of subject panels (for example proposing new members or advising on areas of specialism required on the panel).
6. To be familiar with the content of the SII workbook for this subject and be available to offer advice or guidance to the author.

And potentially to substitute for the Senior Advisor in the following ways:

7. To represent the examination at the annual Qualifications Assessment Board.
8. To chair panel meetings (typically one or two 2-3 hour meetings per year). These meetings cover syllabus development and exam question sign-off. All preparation and materials for this are provided by the Examinations Manager but the Senior Advisor would be asked to facilitate decision making during the meeting. Suitable dates will be agreed with the SII.
9. The SII would also be grateful if you could write a sentence or short paragraph in support of the exam/s you are involved in and their relevance and importance to the industry.

The SII assumes that by signing this agreement and providing a statement of support that permission is granted to the SII for this to be used *responsibly* in describing (outside the SII) the quality assurance processes you are involved in and your support of the qualification.

Confidentiality

10. I, the undersigned, undertake not to disclose any confidential information relating to the Securities & Investment Institute's examinations of which I become aware. This includes information on individual examination questions, examination papers, examination profiles, pass marks, statistics, unpublished examination developments or any other information made available to me during the course of my involvement with the Institute's examinations.
11. I undertake to keep such information in strict confidence and will not, without the prior written consent of the Securities & Investment Institute, disclose any confidential information to any other person or use it for any purpose other than that of the work I am engaged in with the Institute. I further agree not to send or discuss any confidential aspects of the work of the Institute's panels with any other party without the Securities & Investment Institute's written permission.

12. I undertake to notify the Securities & Investment Institute and withdraw from any examination work with the Institute if my role changes so that my continuing involvement might result in a conflict of interest.

Name: _____

Date: _____