

# Financial Adviser

## LEVEL 4



24 month programme + EPA

Our Level 4 Financial Adviser apprenticeship is focused on enhancing the skillset of finance professionals to advise customers on life products, pensions and investment needs.

### Introduction to the course

Our Level 4 apprenticeship is a higher-level apprenticeship focused on developing learners professionally to the industry standard. On completion you will be equipped to specialist advice, and you will gain an internationally recognised and accredited qualification. You will attain greater skills, in depth knowledge and the experience needed to progress with the financial industry, through the variety of topics and subjects covered.

### Learner outcomes

On completion of this apprenticeship your employee will have the qualifications, skills and confidence needed to offer customers reliable advice on health and life insurances, pensions and investments.

They will build long term relationships with customers as they continually guide them in making informed financial decisions. This allows businesses to develop a customer base and retain them as financial advice is needed throughout different life stages.

### A good fit for

This apprenticeship is relevant to those currently working in an established financial role such as a Paraplanner or in a supportive role to a financial adviser.

### Assessment

The learner will take a qualification through the Chartered Insurance Institute (CII) comprising of six exams before they complete their end-point assessment. Apprentices will need to complete Level 2 English and Mathematics before taking their final assessment, if they do not have an equivalent already obtained.

The EPA will consist of two assignments - a case study test viva, based on a portfolio of evidence put together by the apprentice.

### What's next?

Completion of this apprenticeship and allows learners to progress to an Advanced Diploma in Regulated Financial Planning. Learners will also be able to gain membership to CII, the leading awarding body for financial services.

# babington

### Course overview



**Start Date**  
Flexible



**Level**  
3



**Duration**  
24 months + 3-month EPA



**Delivery**  
Blended



**Assessment**  
On-Programme and End-Point Assessment



**Qualification**  
Apprenticeship including a CII Diploma in Regulated Financial Planning Qualification



**Entry Requirements**  
Maths and English at Level 2

# Financial Adviser

## LEVEL 4

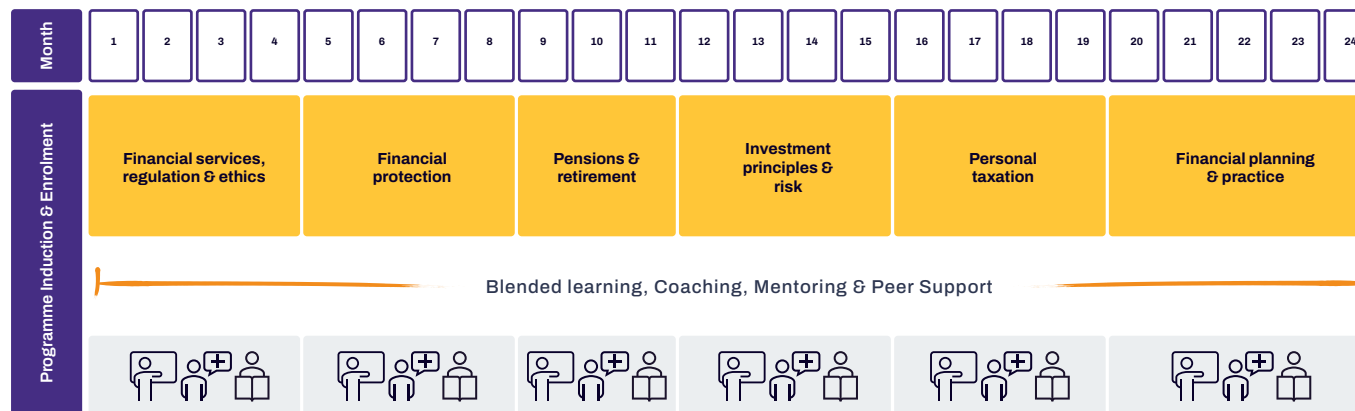


24 month programme + EPA

Our Level 4 Financial Adviser apprenticeship is focused on enhancing the skillset of finance professionals to advise customers on life products, pensions and investment needs.

unlocking potential  
delivering personalisation  
enhancing performance

## Blended Delivery Model



\* Maths and English functional skills may be included in your apprenticeship programme depending on the programme requirements and your prior attainment level.

Gateway



End Point Assessment

3 Months

- ✓ Case Study
- ✓ A viva
- ✓ Portfolio



Apprenticeship Achieved

Key



Workshop



Progress reviews



Exam