

Financial Services Administrator

LEVEL 3



15 month programme + EPA

The CII apprenticeship in financial administration is an ideal start to a career in finance, giving you valuable administrative experience.

Introduction to the course

The financial advice market consists of 19,000 SME businesses. Due to recent changes, more administrative support is required by firms to provide an efficient, high quality, and compliant service to their clients.

This qualification responds to this demand whilst also providing an ideal entry point for a career in the sector, with progression routes leading to several roles with full professional qualifications.

Learner outcomes

The financial services sector and its regulation and ethics are covered in one unit. For the other unit, the learner may choose to study either office administration or pensions administration. Both pathways cover the key product types and principles and processes in their effective and compliant administration.

As part of the compulsory unit the learner will cover:
Financial Services and Customer Requirements; Investments and Loan Repayments; The UK Financial Industry and the Role of Government; Legal Principles, UK Taxation and State Benefits and Financial Services and Legislation and FCA Rules and Measures.

A good fit for

This apprenticeship is suited to someone in a customer service role, complaints handler, directly responding to customer queries.

Assessment

The EPA consists of four assessments. These are a Work based project, a Portfolio, an Interview and a Review.

What's next?

On completion of this apprenticeship the learner can progress to a Financial Adviser Level 4 qualification.



Course overview



Start Date
Flexible



Level
3



Duration
15 months + 3 months EPA



Delivery
Blended



Assessment
On-Programme and End-Point Assessment



Qualification
CII Financial Services Administrator Level 3



Entry Requirements
Maths and English at Level 2

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unlocking potential
delivering personalisation
enhancing performance

Blended Delivery Model

