

# Financial Services Customer Adviser

## LEVEL 2



### 12 Month Programme + EPA

An entry level qualification to help customers in banks and building societies or the broader financial services sector.

### Introduction to the course

This apprenticeship has been designed for use in banks and building societies, but may have wider application across financial services, including life insurers and other insurance sectors. Within these organisations there are several front-line roles that deal with customers and require a high level of technical knowledge and skills across a wide range of products - these may happen in a branch, over the phone, through the internet/social media or an operations centre that supports other areas. The learner may deal with individuals, businesses or a small portfolio of accounts.

We offer the add on of LF1 (Award in Life and Pensions Foundations) or FIT (Award for Foundation Insurance) for FREE as part of this apprenticeship.

### Learner outcomes

There is no mandatory qualification, but a choice of additional qualifications can potentially be chosen by the client as an additional bolt on. Typical activities the learner will cover could include: understanding customer needs and meeting those needs with the right products and services; promoting new digital services; pro-actively calling customers to deepen relationships; resolving tricky complaints; working with other areas of the organisation to meet customer needs.

### Assessment

If Learners include the Insurance specialism route into their training, they will have an additional examination in Month 8 of the programme.

Learners will be assessed through an on-programme and an End-Point Assessment.

As they study towards the qualification, they will also gain off-the-job training and maintain a training file in line with the employer's performance management process to create their portfolio.

### A good fit for

This apprenticeship is best suited to someone who is looking to start a career in the finance industry.

### What's next?

This apprenticeship puts the apprentice on the pathway towards professional membership of the Chartered Insurance Institute. After completion, learners can progress onto a higher-level Financial Services apprenticeship, such as:

- Senior Financial Services Customer Adviser Level 3
- Financial Administrator Level 3
- Mortgage Adviser Level 3
- Insurance Practitioner Level 3



### Course overview



**Start Date**  
Flexible



**Level**  
2



**Duration**  
12 months + 3 months EPA



**Delivery**  
Blended or workbased depending on FIT.



**Assessment**  
On-Programme And End-Point Assessment



**Qualification**  
Apprenticeship including Financial Services Customer Adviser Level 2 and either an Award in Life and Pensions Foundations or an Award for Foundation Insurance.



**Entry Requirements**  
Learners must have completed level 2 Maths and English by the end of the apprenticeship and other requirements may be set by certain employers.

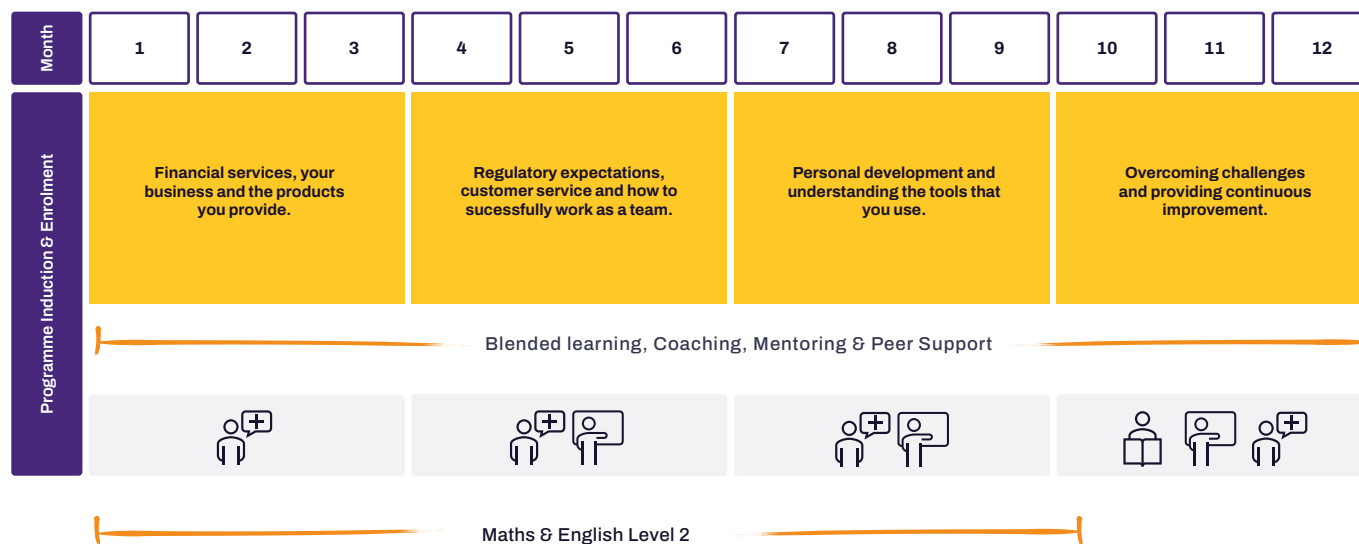
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## Blended Delivery Model



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

unlocking potential  
delivering personalisation  
enhancing performance

### Gateway



### End Point Assessment

3 Months

- ✓ Portfolio
- ✓ Professional discussion

 Apprenticeship Achieved

### Key



Exam



Workshop



Progress reviews