

# Mortgage Adviser

## LEVEL 3



15 Month Programme + EPA

This apprenticeship gives learners access into a career as a mortgage adviser, assisting people through one of the biggest changes and investments in their lives; buying a new home.

### Introduction to the course

Mortgage advice is provided by several different types of businesses - direct to consumer through banks and building societies and through intermediaries in the form of independent brokers or advisers linked to an Estate Agent or New Homes Developer. Due to changes in recent legislation, including the 'Mortgage Market Review', the role of the Mortgage Adviser has become more technical, with increased regulatory requirements and has led to an increase in demand for qualified practitioners in this sector.

### Learner outcomes

The role of a qualified Mortgage Adviser is to identify and satisfy customer mortgage requirements and associated protection needs, through fully compliant regulated meetings. In addition to giving advice on appropriate mortgage products, the Mortgage Adviser also advises on related protection products including life assurance, critical illness, accident, sickness and unemployment, income protection and buildings and contents insurance.

The learner will cover: the UK Financial Services industry; financial assets and product types and regulatory processes and legislation. Also covered is specific information on the house buying process, mortgage needs and requirements plus the role of the Mortgage Adviser.

### Assessment

Assessment includes 2 examinations:

- UK Financial Services Regulation and Ethics(CF1)
- Mortgage Advice(CF6)

The End-Point Assessment will contain 2 assessment components:

- A video-recorded role play scenario.
- A portfolio of work which is supported by reflective discussion.

Apprentices must also achieve Level 2 English and Mathematics before completion.

### A good fit for

This apprenticeship is relevant to those looking for an entry point for a career in the mortgage advice sector or for potential progression into Financial Services

### What's next?

This apprenticeship offers an ideal entry point for a career in the mortgage advice sector, or for potential progression into other financial services roles. Successful completion of the certificate allows CII members who are also members of the CII's Society of Mortgage Professionals to use the designation Cert CII (MP). Continuing professional development requirements apply.

# babington

### Course overview



**Start Date**  
Flexible



**Level**  
3



**Duration**  
15 Months + 3 Months EPA



**Delivery**  
Blended



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



**Qualification**  
Apprenticeship including Certificate in Mortgage Advice CF1 and CF6



**Entry Requirements**  
Learners must have completed level 2 maths and English by the end of the apprenticeship and must be in a role which is relevant to the industry.

# Mortgage Adviser

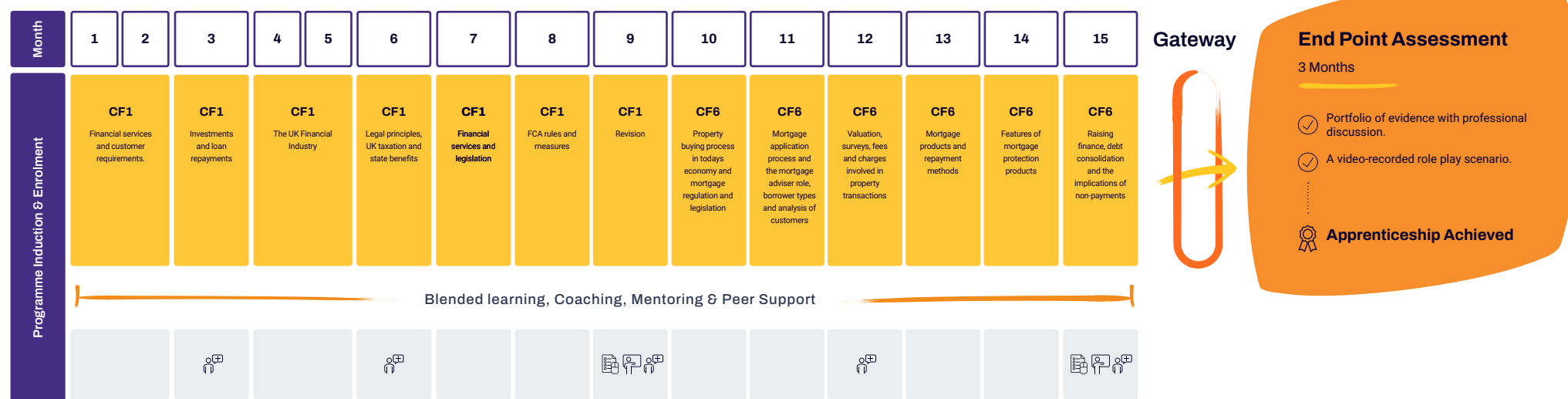
## LEVEL 3

unlocking potential  
delivering personalisation  
enhancing performance

 15 Month Programme + EPA

This apprenticeship gives learners access into a career as a mortgage adviser, assisting people through one of the biggest changes and investments in their lives; buying a new home.

## Blended Delivery Model



Maths & English Level 2

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

### Key



Exam



Progress Review



Workshop