

Senior Financial Services Customer Adviser

LEVEL 3 (FINANCIAL PATHWAY)

 15 Month Programme + EPA

An advanced qualification enabling financial customer adviser support at a senior level.

Introduction to the course

Designed for use in banks and building societies, this apprenticeship can be applied across financial services and insurance services. It leads to front-line roles dealing with customers and requires technical knowledge and product awareness. The learner will spend much of their time attending individual customer needs, so interpersonal skills are paramount.

There is an option for successful apprentices to become Team Leaders, supporting and motivating colleagues while keeping up with all legal, regulatory and risk requirements.

Learner outcomes

Learners will achieve the Certificate in Financial Services.

Learners will cover:

- The role of their organisation in the financial sector.
- Regulatory and legal compliance.
- Products and services that their company offers.
- Customer relationship management and problem solving.

For apprentices who manage a team, they will also cover team leadership and development.

Assessment

Apprentices will take a qualification through the Chartered Insurance Institute (CII) before taking their End-Point Assessment. The EPA for this apprenticeship will consist of three assessments; a portfolio, a professional discussion and a review.

Apprentices must achieve Level 2 English and Mathematics.

A good fit for

Those in an entry level role to the business or looking to progress from a lower level role or apprenticeship.

What's next?

On completion of this apprenticeship, the apprentice can continue to develop their career within the organisation through a range of possible pathways such as giving advice on regulated products, or becoming a specialist in a specific area.



Course overview



Start Date
Flexible



Level
3



Duration
15 months + 3-month EPA



Delivery
Blended



Assessment
On-Programme And End-Point Assessment



Qualification
Senior Financial Services Customer Adviser Level 3 apprenticeship including Financial Services Certification, accredited by the CII.



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.

Senior Financial Services Customer Adviser

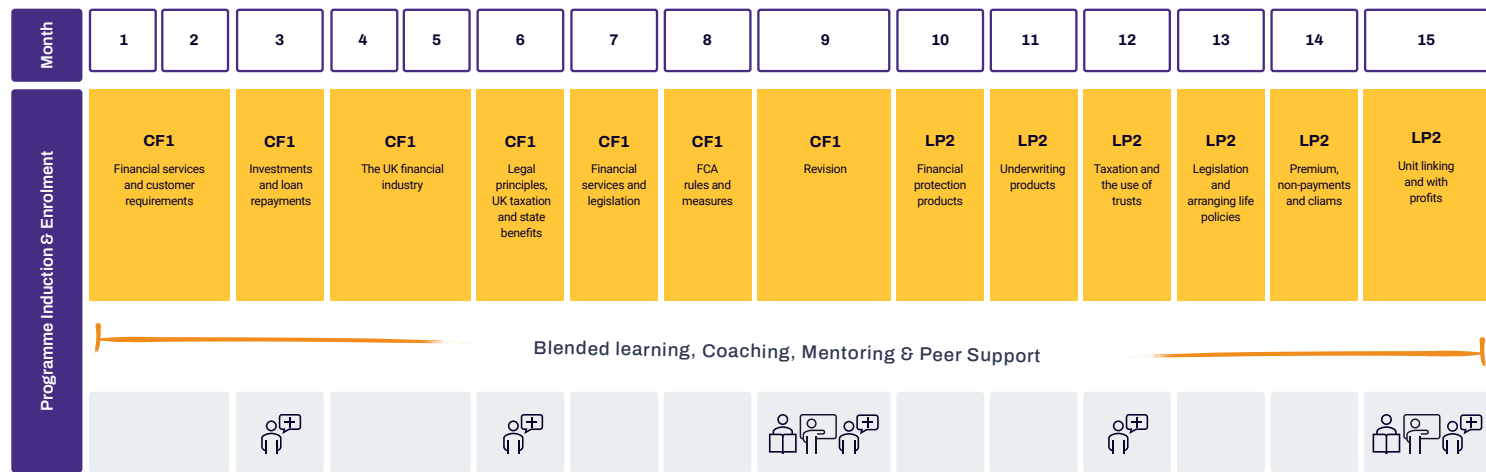
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unlocking potential
delivering personalisation
enhancing performance

Blended Delivery Model



Gateway



End Point Assessment

3 Months

- Portfolio
- Professional discussion
- Review

 Apprenticeship Achieved

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



Workshop



Progress reviews

Senior Financial Services Customer Adviser

LEVEL 3 (INSURANCE PATHWAY)

 15 Month Programme + EPA

An advanced qualification enabling financial customer adviser support at a senior level.

Introduction to the course

Designed for use in banks and building societies, this apprenticeship can be applied across financial services and insurance services. It leads to front-line roles dealing with customers and requires technical knowledge and product awareness. The learner will spend much of their time attending individual customer needs, so interpersonal skills are paramount.

There is an option for successful apprentices to become Team Leaders, supporting and motivating colleagues while keeping up with all legal, regulatory and risk requirements.

Learner outcomes

Learners can achieve the Certificate in Insurance.

Learners will cover:

- The role of their organisation in the financial sector.
- Regulatory and legal compliance.
- Products and services that their company offers
- Customer relationship management and problem solving.

For apprentices who manage a team they will also cover team leadership and development.

Assessment

Apprentices will take a qualification through the Chartered Insurance Institute (CII) before taking their End-Point Assessment. The EPA for this apprenticeship will consist of three assessments; a portfolio, a professional discussion and a review.

Apprentices must achieve Level 2 English and Mathematics.

A good fit for

Those in an entry level role to the business or looking to progress from a lower level role or apprenticeship.

What's next?

This apprenticeship provides professional membership of the Chartered Insurance Institute. It is also the first step on the route to a Diploma in Insurance (Dip CII) qualification.



Course overview



Start Date
Flexible



Level
3



Duration
15 months + 3-month EPA



Delivery
Blended



Assessment
On-Programme And End-Point Assessment



Qualification
Senior Financial Services Customer Adviser Level 3 apprenticeship including Certificate in Insurance, Cert CII accredited.



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.

Senior Financial Services Customer Adviser

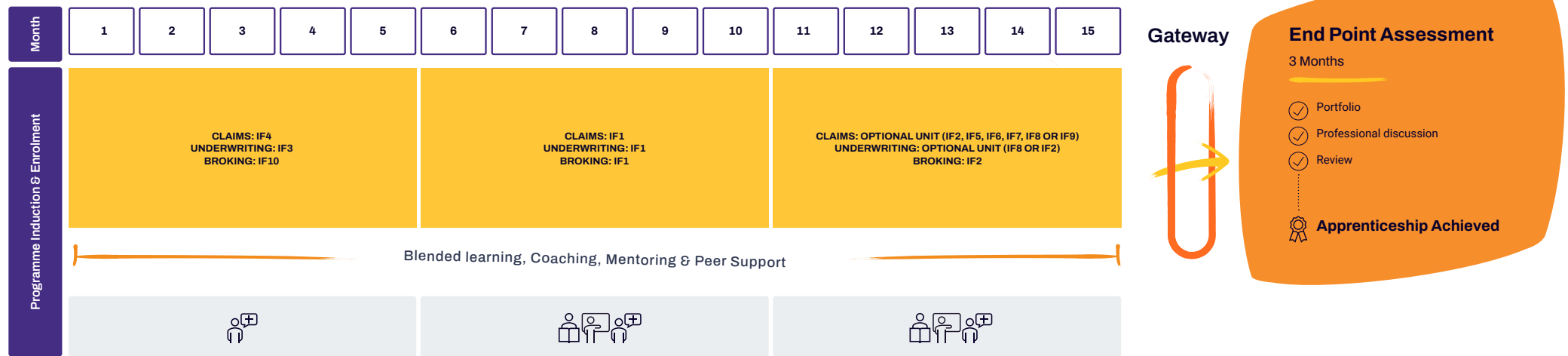
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Maths & English Level 2

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Units

IF1 - Insurance, Legal and Regulatory
IF2 - General Insurance Business
IF3 - Insurance Underwriting Process
IF4 - Insurance Claims Handling Process
IF5 - Motor insurance products
IF6 - Household insurance products
IF7 - Healthcare insurance products
IF8 - Packaged commercial insurances
IF9 - Customer service in insurance
IF10 - Insurance broking fundamentals

Key



Exam



Workshop



Progress reviews