

Financial Services

Level 2 Financial Services Customer Adviser

Develop your skills and knowledge in financial services, providing a pathway towards professional membership in the financial industry.

1

Who is this qualification for?

The Financial Services Customer Adviser is focused on people in a front-line role, who deal with relatively straightforward transactions within a detailed regulatory and risk framework. Typical roles include dealing with enquiries by phone, email or post, administering customer accounts, contacting customers and identifying sales opportunities.

2

The Journey

There are three key stages to the delivery of the Apprenticeship:

- On Programme
- Gateway
- End Point Assessment (EPA)

3

On Programme

This is the substantive part of the Apprenticeship and includes both on-the-job and off-the-job training and assessment. During this stage the learner will develop skills, knowledge and behaviours, as outlined in the two-part Standard. One of the key features of the Standard Apprenticeship is flexibility. Providers and employers now



Gateway

The Gateway is the opportunity for the provider and the employer to agree whether the Apprentice is ready to take their EPA. Considerations for this are:

- Has the Apprentice been on programme for a minimum of 12 months?
- Learners should demonstrate or achieve English and Maths prior to the Gateway
- Has the Apprentice been assessed against all of the knowledge, skills and behaviours?
- Has the Apprentice had the opportunity to develop a showcase portfolio and prepared for a professional discussion?

have more choice in how they deliver the On-Programme component of the Apprenticeship. A blend of resources and employer/provider designed materials are used to deliver bespoke Apprenticeship programmes that meet the needs of employers and learners.

4 Study Mode

Our provision is delivered through a mixture of face-to-face visits, e-learning and live or recorded webinars. Learners have 24/7 access to course materials and resources. This minimises travel, hiring of venues and time out of the office.

5 Entry Requirements

There are no specific entry requirements for this qualification. Employers can decide the minimum level of qualification applicable. Learners must be in a job relevant to the Apprenticeship. English and Maths at Level 2 is required prior to the Gateway.

6 Link to professional registration

Completion of this apprenticeship forms the foundation of a career within the sector, giving the base for further development through a career path within the organisation which may include a Level 3 or other apprenticeship. Membership of a professional organisation is not available at this level.

**End Point Assessment**

The EPA for the Financial Services Customer Adviser Apprenticeship is made up of the following components:

- Assessment of portfolio of evidence.
- Professional discussion related to portfolio and CPD activity.

The EPA is carried out by an independent Apprentice Assessment Organisation (AAO). Riverside will advise and engage with a suitable AAO on behalf of the learner and employer.

**Duration**

Typically this apprenticeship will take 12 Months

**Funding Cap**

£4,000

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