



Investment Operations Administrator Level 2
Level 2



Overview

Apprenticeship: Investment Operations Administrator Level 2

Qualification: Level 2

Duration: 12-18 months

Investment Operations Support staff work within the operational and administrative areas of businesses in the Financial Services sector that engage in investment management, trading and reporting activities. The support structure underpinning these activities is substantial and varied, with a domestic and global client base of institutional and retail clients that include private individuals, small businesses, collective investment schemes, pension funds, charities, corporations and governments. This role typically sits within the operations areas of stock exchanges, stockbrokers, investment managers, banks, financial advice and wealth management firms, investment consulting and investment administration businesses. A fully competent employee at this level will be capable of performing routine, non-complex tasks in these businesses.



Type of job roles the programme is for

- Assistant Investments Administrator
- Portfolio Assistant
- Junior Wealth Management Administrator

Qualifications

- Various qualifications available dependent on job role – CISI-Accredited
- Functional Skills in Maths
- Functional Skills in English

Progression opportunities

- Investment Operations Technician Level 3
- Investment Operations Specialist Level 4

Core competencies

- Service delivery
- Communication
- Honesty and integrity
- Teamwork
- Regulatory and compliance

Training Process

Apprenticeship:

Investment Operations Administrator Level 2

- New learners are assessed by a Skills Coach to ensure their suitability for the programme
- After this, they will complete an initial assessment and scoping to identify areas of improvement, and development goals for the apprenticeship
- An apprenticeship induction is then held for new learners, where they will be introduced to the schedule of study

Qualification: Level 2

Duration: 12-18 months

Qualification:

Ongoing Skills Development Coach Support

1 - Introduction to Securities and Investments

- Classroom/Online: 3-4 days

Gateway

- 12-15 months

Assessment

- 15-18 months
- Reflective Discussion, Portfolio

Pathway

Apprenticeship:
**Investment Operations
Administrator Level 2**

There is a clear GC Education & Skills career pathway for the apprentice once they've completed the Level 2 Investment Operations Administrator course.

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Financial Services Apprenticeship Routes

Level 2

Financial Services Customer Advisor Level 2

Investment Operations Administrator Level 2

Level 3

Insurance Practitioner Level 3

Investment Operations Technician Level 3

Risk / Compliance Officer Level 3

Snr Financial Services Customer Advisor Level 3

Workplace Pensions Administrator / Consultant Level 3

Level 4

Insurance Professional Level 4

Investment Operations Specialist Level 4