



Financial Services Customer Advisor
Level 2



Overview

Apprenticeship: Financial Services Customer Advisor

Qualification: Level 2

Duration: 12-18 months

This apprenticeship has been designed for use in banks and building societies, but may have wider application across Financial Services. Within these organisations there are a number of front line roles that deal with customers on a range of relatively straightforward transactions within a detailed regulatory and risk framework - these may happen in a branch, over the phone, through the internet or be done by an individual in an operations centre that supports other areas of the business.



Type of job roles the programme is for

- Customer Service Advisor
- Inbound Calls Handler
- Contact Centre Agent

Qualifications

- There are no required qualifications for this apprenticeship, however there are various optional qualifications to choose from (dependent on job role)
- Functional Skills in Maths
- Functional Skills in English

Progression opportunities

- Senior Financial Services Customer Adviser Level 3

Core competencies

- Industry and company understanding
- Regulatory, legal and compliance
- Customer service
- Communication
- Teamwork

Training Process

Apprenticeship:

Financial Services Customer Advisor

Qualification: Level 2

Duration: 12-18 months

- 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

Optional qualifications

There are options to undertake one of the following:

1. Customer Service qualification
2. A relevant regulatory qualification

Gateway

- 15 months

Assessment

- 15-18 months
- Reflective Discussion, Portfolio

Pathway

Apprenticeship: Financial Services Customer Advisor

There is a clear GC Education & Skills career pathway for the apprentice once they've completed the Level 2 Financial Services Customer Advisor Level 2 course.

Qualification: Level 2

Duration: 12-18 months

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