



Snr Financial Services Customer Advisor
Level 3

Overview

Apprenticeship:

Snr Financial Services Customer Advisor

Qualification: Level 3

Duration: 15-18 months

This apprenticeship has been designed for use in banks and building societies, but may have wider application across Financial Services, including life insurers. Within these organisations there are a number of front line roles that deal with customers and require a high level of technical knowledge and skills across a wide range of products - these may happen in a branch, over the phone, through the internet/social media or an operations centre that supports other areas.



Type of job roles the programme is for

- Junior Client Relationship Manager
- Senior Contact Centre Agent
- Customer Adviser

Qualifications

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

Progression opportunities

- Progression routes could be various financial services apprenticeship standards from level 4 and above

Core competencies

- Systems and processes
- Products and services
- Customer relationship management
- Communication
- Delivering results

Training Process

Apprenticeship:

Snr Financial Services Customer Advisor

- 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

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Optional qualifications

There are optional qualifications available such as:

- Professional Banker Certificate
- Investment Operations Certificate
- Certificate in Financial Services
- Certificate in Insurance

Gateway

- 15-16 months

Assessment

- 16-18 months
- Reflective Discussion, Portfolio

Pathway

Apprenticeship:

Snr Financial Services Customer Advisor

There is a clear GC Education & Skills career pathway for the apprentice once they've completed the Level 3 Senior Financial Services Customer Advisor course.

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Duration: 15-18 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