



GROW
LEARN
PROGRESS

GLP Training is dedicated to helping businesses and learners make the most of their apprenticeships. Passionate about what we do and how we do it, our ethos is based around delivering exceptional service to both clients and learners, whilst providing a truly personal, bespoke service, rather than the off-the-shelf products provided by many training providers.

We are a growing, national company and our aim is to become the provider of choice for companies looking for a personal, tailored approach for their apprenticeship programmes.

FINANCIAL SERVICES ADMINISTRATOR / LEVEL 3

Course overview

This will give you an awareness of how to provide administrative support to a financial organisation, to provide a high quality and compliant service.

Suitability

This course is suitable whether you are already working, or are soon to be working, providing administrative support to a financial organisation.

Professional qualification included

During the apprenticeship, you are required to achieve one of UK Financial services, regulation & ethics (CF1) – Chartered Insurance Institute (CII) UK financial regulation (UKFR) – IFS University College (Institute of Financial Services) Financial Services regulation and Ethics - Chartered Bankers Institute (CB).

Fees

The fees for this course are £12,000.

Eligibility

Apprenticeships are available to people of all ages, who are either new to a role or looking to enhance their knowledge and skills within an existing role.

Career progression

This is an entry level role which provides the foundation knowledge skills & experience for progression into a number of career paths including Senior Administrator, Paraplanner, Financial Adviser or Mortgage Adviser.

Link to professional registration

This apprenticeship provides the first step on the pathway to professional membership of the Chartered Insurance.

Duration

You will take a minimum of 12 months to complete, followed by an end-point assessment, taking place soon afterwards. This will be whenever you, your trainer & employer all feel you are ready.

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Learning Outcomes

Upon completion of the qualification, apprentices will be able to showcase the following skills, knowledge and behaviours:

Skills

- Quality service delivery
- Customer communication and relationships
- Team working and collaboration
- Planning and prioritising
- Using systems and processes

Behaviours

- Honesty & Integrity
- Dependability
- Enthusiasm
- Adaptability
- Personal commitment

Knowledge

- Financial Services market
- Regulatory and compliance
- Products
- Products and services

Delivery

The training is a blended learning delivery model, which takes place in the work place during working hours, wherever this may be, according to the apprentices role. This consists of:

- 1 to 1 monthly meetings with your trainer to give you feedback, provide coaching, gather evidence and discuss Maths and English.
- Progression review as a bi-monthly meeting with you, your Trainer and your line manager which will summarise the learning that has taken place over the last period
- On-line learning courses and/or group sessions
- Maths and English at Level 2 (if not previously achieved)
- 20% of time at work to be spent working towards apprenticeship
- End Point Assessment (EPA) by an external examiner to complete qualification

