

Mortgage Adviser

Level 3

Duration: 12-18 months

Funding band: £9,000



What is the background to this programme?

Mortgage advice is provided by a number of different types of businesses; direct to consumers through banks & building societies and also via mortgage intermediaries in the form of independent brokers or advisers linked to an Estate Agent or New Homes Developer. Due to changes in regulation, including the 'Mortgage Market Review', the role of the Mortgage Adviser has become more technical, with increased regulatory requirements and has led to an increase in demand for qualified practitioners in the sector. The role of a qualified Mortgage Adviser is to identify and satisfy customer mortgage requirements and associated protection needs, through fully compliant regulated meetings. These meetings can take place in a variety of environments including face to face or over the telephone. In addition to giving advice on appropriate mortgage products, the mortgage adviser also advises on related protection products including life assurance, critical illness, accident, sickness and unemployment, income protection and buildings and contents insurance.

What are the entry requirements?

Apprentices without level 2 English and Maths will need to achieve this level prior to completion of this apprenticeship. The apprentice will be required to complete one of the following qualifications; 'The London Institute of Banking & Finance Certificate in Mortgage Advice and Practice' (LIBF), the 'Certificate in Mortgage Advice' (the Chartered Insurance Institute) or the 'Mortgage Advice and Practice Certificate' (the Chartered Banker Institute).

What is covered?

- Understanding of industry and company
- Regulatory and compliance
- Products
- Using systems and processes / technical ability
- Commercial awareness
- Quality service delivery
- Governance
- Communication
- Relationship development

What qualification is achieved?

By passing the apprenticeship, professional registration can be achieved by application to the relevant Professional or Awarding Body, with recognised status as follows:

- CeMAP'; The London Institute of Banking and Finance
- 'Cert CII (MP)'; The Chartered Insurance Institute
- 'PMA'; Chartered Banker Institute

Apply to start or ask for more information

Our team are here to help.

The quickest route is to email learning@davies-group.com

We look forward to chatting to you soon!



"I wholeheartedly recommend Davies Learning Solutions, my learning journey has been clear and supported and I passed first time – thank you!"

– Pelumi Ojo, Apprentice