

Senior Financial Services Customer Adviser

Level 3

Duration: 12-24 months

Funding band: £8,000



What is the background to this programme?

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 frontline 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. They may deal with individuals, businesses or a small portfolio of accounts. Typical activities could include, depending on the organisation, understanding customer needs and meeting those needs with the right products and services such as the type of bank account / credit card/loans/insurances. Responsibilities also often includes promoting new digital services to encourage customers to use these channels, proactively calling customers to deepen relationships, resolving tricky complaints, and working with other areas of the organisation to meet customer needs. Products within the scope of this role are core banking, savings and insurance.

What are the entry requirements?

Apprentices without level 2 English and Maths will need to achieve this level prior to taking the End-Point Assessment. For those with an education, health and care plan or a legacy statement, the apprenticeship's English and Maths minimum requirement is Entry Level 3. A British Sign Language (BSL) qualification is an alternative to the English qualification for those whose primary language is BSL.

What is covered?

- Financial services market
- Understanding the industry and company
- Regulatory, legal and compliance
- Products and services
- Systems and processes
- Customer relationship management
- Customer service
- Delivering results
- Team working
- Communicating and influencing
- Problem solving
- Personal development

What qualification is achieved?

The apprentice will complete an appropriate qualification/examination (as considered most relevant by the employer) from one of the following Professional Bodies (after which they may apply for membership to the relevant body):

- Chartered Banker Institute
- Chartered Insurance Institute
- Chartered Institute of Securities & Investment
- The London Institute of Banking & Finance

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