

# Senior Financial Services Customer Adviser Level 3

Duration: 15-18 months

Funding band: £8,000

## Who is this programme suitable for?

We will assess the suitability of each candidate on a **case-by-case** basis before starting the apprenticeship, however, below is some guidance as to what a suitable candidate may look like.

This is an **entry level apprenticeship** into the finance industry, suited to those with no prior related qualifications, looking to go into customer facing roles where an understanding of customer needs is required as well as the ability to build external relationships.

There are no specific academic requirements, however if the apprentice does not have and A\* - C/ 9-4 grade in their Maths and English GCSE's, they will need to attain Functional Skills Level 2 as part of their apprenticeship prior to reaching EPA.

## What does the apprenticeship provide?

Completion of this apprenticeship will provide you with the following Knowledge, Skills and Behaviours:



Industry & company understanding, regulatory, legal & compliance, products & services, systems & processes.



Customer relationship management, delivering results, teamwork, communicating & influencing, problem solving, continuous improvement, personal development, honesty & integrity, flexibility, resilience.



Team leadership, team development, compliant delivery.



## How does Davies deliver?

Davies provides support through two main learning systems; DLS Thrive and Aptem. This is where the majority of course content can be found. As well as course content, Davies provides support through:



**Connect and Learn Sessions**



**Progress Reviews**



**1-2-1 coaching**



**Soft Skills Workshops**



**Professional Qualification Workshops**



**End Point Assessment Support**

## What qualifications are achieved?

### Senior Financial Services Customer Adviser Level 3

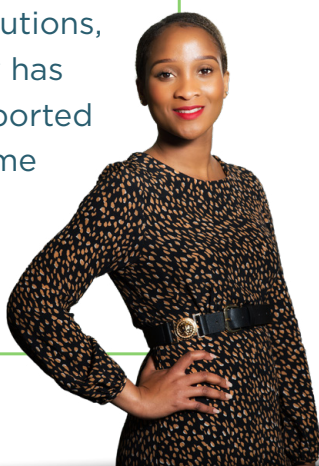
- Chartered Insurance Institute (CII) - Certificate in Financial Services; Certificate in Insurance
- Chartered Institute of Securities & Investment (CISI) - Investment Operations Certificate
- Chartered Bankers Institute - Professional Bankers Certificate



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

- Pelumi Ojo, Apprentice



## Apply to start or ask for more information

Our team are here to help.

The quickest route is to email [learning@davies-group.com](mailto:learning@davies-group.com) or call us on **0208 304 3666**

**We look forward to chatting to you soon!**

