



# LEVEL 2 FINANCIAL SERVICES CUSTOMER ADVISER

## APPRENTICESHIP STANDARD

### Occupational Profile:

This apprenticeship has been designed for those in the Financial Services sector and focuses on front-line customer interactions within the regulatory framework.

Activities include customer enquiries in helping them use new digital services, dealing with enquiries by phone, email or post, administering customer accounts, resolving relatively straightforward problems and complaints, proactively contacting customers, identifying sales opportunities and making referrals.

### Course Overview:

This apprenticeship equips learners with the necessary skills and knowledge to provide excellent customer service and support within the financial services sector.

It covers a wide range of tasks from handling customer enquiries to using digital banking solutions.

### Entry Requirements:

Entry Requirements: Minimum GCSE Grade 3/D (or equivalent in Maths and English) or higher.

### Delivery:

All our apprentices will attend an SNE Centre one day per week to learn the knowledge, skills, and behaviours required by this standard.

In addition, our work-based tutor will also visit the apprentice in the workplace every four weeks to contextualise classroom learning and include practical work-based learning, observations, and other activities relevant to the standard and their education.

During every other visit, the tutor will review the apprentice's learning from our SNE Centre and the workplace. This will be a tripartite meeting between the apprentice, their mentor or manager and the Tutor.



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### Duration:

12 months + 3 months \*EPA



## Link to professional registration and progression:

Higher Level Apprenticeship or career progression within the financial sector

## Areas you will develop:

### Knowledge:

- Industry and company understanding
- Regulatory, Legal and Compliance
- Products and Services
- Systems and Processes

### Skills:

- Customer Service
- Delivering Results
- Teamwork
- Communication

### Behaviours:

- Continuous improvement
- Personal Development
- Honesty & Integrity
- Flexibility
- Resilience

## Advance Your Career with Professional Memberships:

This apprenticeship aligns with:

The Chartered Banker Institute, the London Institute of Banking & Finance, or the Chartered Insurance Institute (depending on the qualifications taken)

### \*End-Point-Assessment:

The End-Point-Assessment (EPA) is conducted by an independent organisation, who will assess the Apprentice's knowledge, skills and behaviours through the following methods:

#### 1. Portfolio

A Portfolio of Evidence from the final months of the apprenticeship which contains a range of types of evidence demonstrating that the apprentice has met the requirements of the Standard.

#### 2. Professional Discussion

A Professional Discussion that focuses on the softer skills of the Standard, exploring what has been produced in the portfolio, how it has been produced and how well they are performing in their role

The Apprentice is awarded an **overall grade** for their apprenticeship based on their EPA, of **Fail, Pass, or Distinction**.



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