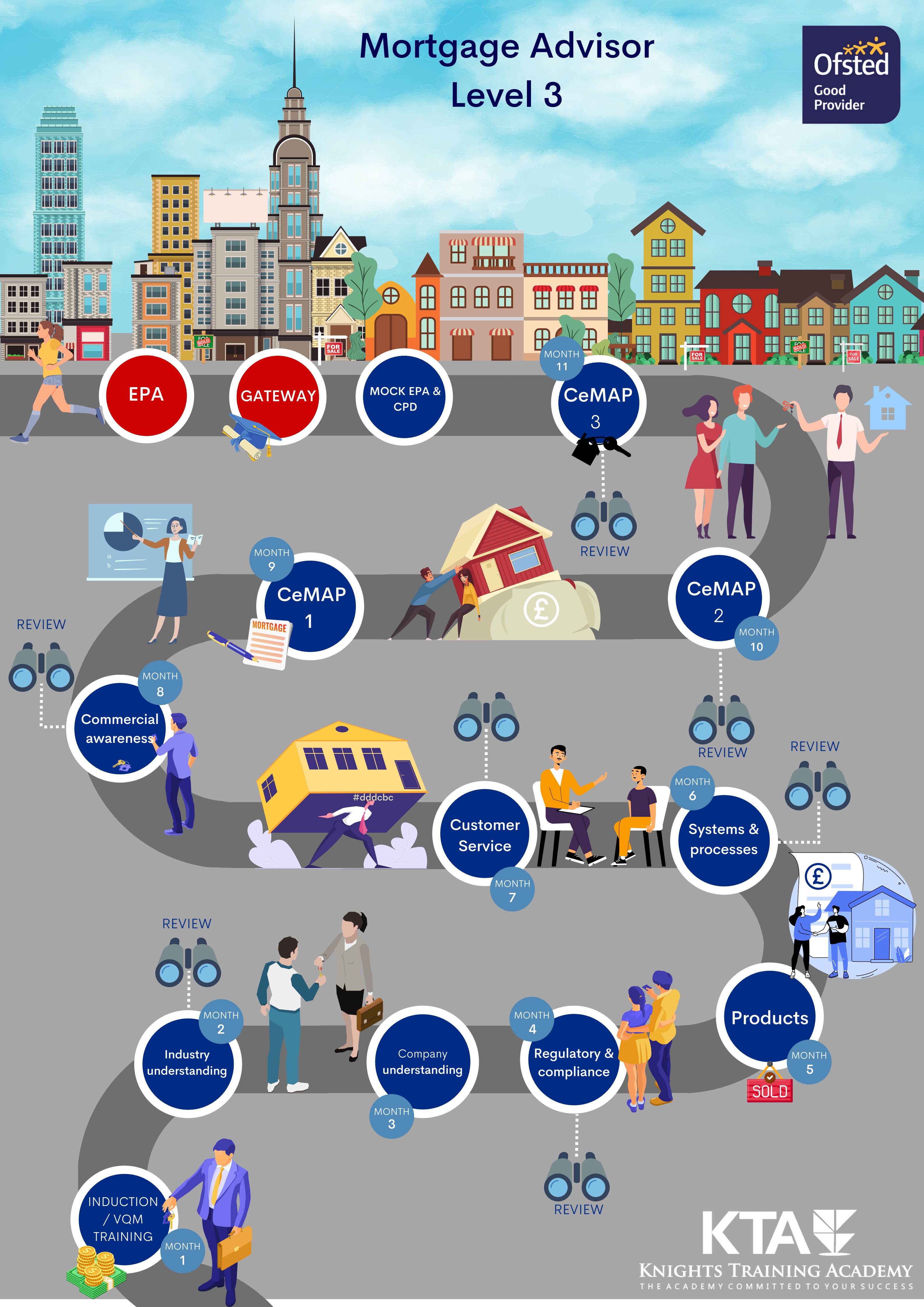


Mortgage Advisor Level 3



INDUCTION / VQM TRAINING
MONTH 1

Industry understanding
MONTH 2

Company understanding
MONTH 3

Regulatory & compliance
MONTH 4

Products
MONTH 5

Customer Service
MONTH 7

Systems & processes
MONTH 6

Commercial awareness
MONTH 8

CeMAP 1
MONTH 9

CeMAP 2
MONTH 10

CeMAP 3
MONTH 11

EPA

GATEWAY

MOCK EPA & CPD

Overview

All the knowledge, skills and behaviour modules are covered during the highlighted monthly visits and must be achieved prior to EPA (End Point Assessment).

The apprentice is recommended to have a base level knowledge of digital literacy and access to tools to allow this to further develop. They must be on programme for 12 months before EPA can be booked. During the apprenticeship, the apprentice will have regular 1-1s with their line manager and assessor, via a combination of personal discussion, observations, Q&A and work-based products of evidence to form a portfolio of evidence. The portfolio, along with the work-based improvement project, must be completed before they can attend a Gateway meeting with their assessor and employer. Here, the apprentice will be signed-off as ready to move forward for their final assessment (EPA).

All apprentices, must achieve Level 2 Functional skills in Maths and English, before they can attend Gateway, unless they prove exemption by prior attainment.

EPA

1. Portfolio of Evidence

The portfolio of learning, needed to enter gateway, will contain the knowledge, skills and behaviours highlighted on the 'road map'. To achieve this, you will need to evidence:

- a. target setting, regular scheduled and recorded one to ones and periodic assessments.
- b. collection of evidence in undertaking the role relevant to the evidence required to demonstrate competence against the standard and
- c. reflective learning and feedback.
- d. observation in key tasks and feedback relevant to the evidence required to demonstrate competence against the standard and assessment
- e. a behaviours log to assess and record the demonstration of the appropriate behaviours

2. Reflective Discussion

Reflective discussion will be used to provide further supportive evidence within the portfolio and will take the form of a structured interview with the Training Provider to explore the content of the portfolio and the learner journey in more detail

3. Video Recorded Role Play Scenario

Video recorded role play scenario (A series of scenarios will be designed by the Independent Assessment Organisation to ensure that consistent levels are maintained for all apprentices).

4. Completion of: The London Institute of Banking & Finance Certificate

Including the following 3 modules:

- The London Institute of Banking & Finance Certificate in Mortgage Advice and Practice (LIBF)
- Certificate in Mortgage Advice (the Chartered Insurance Institute)
- Mortgage Advice and Practice Certificate (the Chartered Banker Institute)

Completion

There are 2 levels of achievement within this apprenticeship: Pass and Distinction. Distinction level performance will be based on 1. Evidence compiled in the portfolio 2. outcome of the role play scenario and 3. Reflection discussion, backed up by managers endorsement.