



Foundation Apprenticeship in Providing Financial Services - Banking Pathway

Overview

This qualification is suitable for individuals working within the Retail Banking Industry who provide products and services to customers either face-to-face or over the telephone. The Apprenticeship will give learners the opportunity to receive recognition for their competence and experience. It has a flexible approach and allows you to select optional and additional units, which meet the requirements of your job role.

The Apprenticeship can be achieved through a mixture of portfolio building, observation, assessment and knowledge / understanding questioning. It consists of qualifications that are included in the Credit and Qualifications Framework for Wales (CQFW) and provides a flexible approach to learning through the selection of units and credits.

The qualifications within the Apprenticeship include:

- > Level 2 NVQ Certificate in Providing Financial Services - Banking Pathway Level 2
- > Certificate in Customer Service
- > Essential Skills Wales Level 1 in Communication
- > Essential Skills Wales Level 1 in Application of Number

Level 2 NVQ Certificate in Providing Financial Services (Banking Pathway)

This certificate is made up of units at Level 2 and 3, where learners can demonstrate their skills in a particular area of financial services. Each unit has a credit value and, in order to complete the certificate, learners are required to achieve a minimum 21 credits. All of the mandatory units must be completed to achieve fourteen credits and the remaining seven credits may be gained by selecting 2 options from the Banking Pathways and another one from the Further Options section in the table below to form a qualification best suited to the learner's job role.

Mandatory Units

Linked Ref No	Title	Level	GLH	Credit
M1	Improving and maintaining workplace competence in financial services environment	2	33	4
M2	Planning and organizing work in a financial services environment	2	33	4
M3	Complying with regulations within the financial services environment	2	52	6

Mae'r Rhaglenni Prentisiaeth, Hyfforddeiaeth a Thwf Swyddi Cymru, a arweinir gan Lywodraeth Cymru, yn cael cymorth ariannol gan Gronfa Gymdeithasol Ewrop

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Banking Pathway - Banking and Building Society Accounts - Optional Units

Linked Ref No	Title	Level	GLH	Credit
A1	Setting up bank or building society accounts for customers	2	15	4
A2	Authorising financial transactions using telecommunications	2	10	4
A3	Operating a sterling counter till	2	11	4
A4	Operating a multi-currency till	2	15	5
A5	Processing documentation for bank or building society accounts	2	10	4

Banking Pathway - Customer payments for financial products and services - Optional Units

Linked Ref No	Title	Level	GLH	Credit
B1	Processing customers financial transactions	2	8	4
B2	Assessing and using straightforward financial information to reconcile accounts	3	10	4
B3	Operating credit control procedures	3	10	4
B4	Preparing and pursuing statements of account for financial products and services	2	6	4
B5	Operating payment by installments	3	10	4
B6	Assessing and using complex financial information to reconcile accounts	3	9	4
Z1	Building effective relationships with clients in a financial services environment	2	1	3
Z2	Providing information to customers in a financial services environment	2	9	4

Further options

Linked Ref No	Title	Level	GLH	Credit
J1	Deliver reliable customer service	2	33	5
J2	Resolve customer service problems	2	14	6
J3	Dealing with customers by telephone in a financial services environment	2	15	4
J8	Give customers a positive impression of yourself and your organisation	2	33	4
J9	Deal with customers using bespoke software	2	33	5
J11	Support customers using online customer services	2	33	5

Please contact us for more information:

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