



International Degrees Ltd

Financial Training Academy Courses

From the Heart of the World's Main Financial Centre

The Financial
Training
Academy Ltd

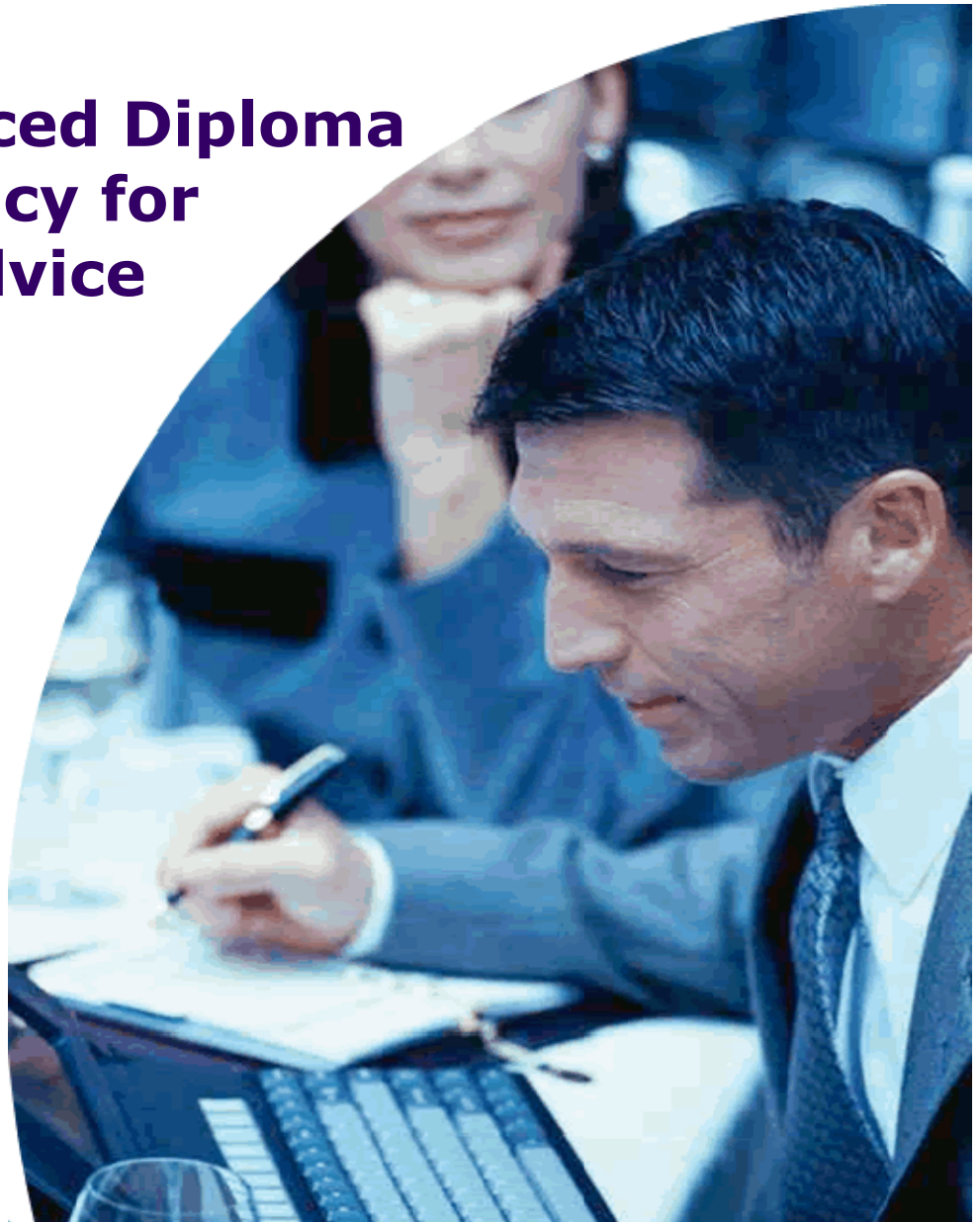
CMA BTEC Advanced Diploma in Competency for Mortgage Advice

Hands on, Tutor-led
training at:

Bank,
City of London

20 Days

Financial services legislation governs the provision of financial advice and candidates will learn about providing Key facts illustrations in accordance with legislation and regulations, as well as the entire Mortgage advice process.. On completion of this course candidates will be at a competent level in the industry.



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LOCAL CONTACT



The main aim of this qualification is to provide candidates with a comprehensive knowledge of the financial advice process in respect of mortgage advice and develop the skills they require to operate in an advisory role at a competency level.

Week 1:

- 1st meeting with client - greeting and rapport building
- Formal introduction
- Set agenda & meeting purpose
- Initial disclosure document
- Terms of business letter
- Data protection & confidentiality
- Fact find (mortgage and protection needs analysis)
- 2nd meeting arrangement with client
- Documents required
- Mortgage process resume

Week 2:

- Mortgage sourcing software –TriGold
- Dashboard – mortgage software use
- Selection of suitable mortgage products
- Key fact illustration preparation and presentation
- Mortgage application form filling in (different lenders format)
- Suitability letter preparation
- Lenders website use
- Lenders application documents examples
- Directly authorised vs. appointed representative
- What is credit report?
- What is credit scoring?

Week 3:

- Mortgage case study: first time buyer
- Mortgage case study: re-mortgage
- Mortgage case study: buy to let
- Mortgage case study: let to buy
- Mortgage case study: right to buy
- Mortgage case study: capital raising
- Mortgage case study: 100% mortgage
- Mortgage case study: self certification
- Data protection act
- Money laundering act

Week 4:

- Insurance products
- Insurance quotation
- Insurance application form
- Sale skills:
- Communicational skills
- Answer telephone skills
- Generation of appointments
- Dealing with customers objections

Assessments

BTEC qualifications are not awarded by official exams at the end of the course. Your knowledge is tested by different assessments taking place during your training.

The evidence of the work you have done will be stored in a folder. Once the folder is complete, it will be checked by Internal Assessors and internally verified by our centres' Internal Verifier. Once the assessment has been internally verified and the candidate has passed, we will then register that pass with Edexcel, who will issue you with an official certificate.

Formalities and Recognition

Awarded by: Edexcel - www.edexcel.org.uk

BTEC Advanced Level: Award, Certificate, Diploma

Key benefits

It's one thing knowing and understanding the mortgage process, but it is another thing doing it. From the fact find, to the insurance quotation, the course will enable you to go into your new role at a confident and competent level.

What qualifications do I gain at the end of the training?

The Qualification you will gain at the end of your training will be a BTEC (Award/Certificate/Diploma) in Competency for Mortgage Advice.

What is a BTEC?

BTEC stands for Business and Technology Education Council. They specialize in courses that develop a broad range of skills in job-related areas.

20 Days
£3000* + VAT
*Promotional Price

