



International Degrees Ltd

Financial Training Academy Courses

From the Heart of the World's Main Financial Centre

The Financial
Training
Academy Ltd

CMA

Advanced Diploma in Competency for Mortgage Advice

When you first start out sourcing your own leads and processing them through to completion it may appear to be quite daunting. Rest assured you will receive the full support of an organisation that is committed to delivering a first class service to both its clients and its staff. 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.

You will be trained to the highest standard, thereby preparing you to succeed in your career. The whole of The Financial Training Academy's infrastructure and experience is in place to ensure that you receive the support you require to perform your duty diligently.

At the end of the training, candidates will gain a: BTEC Advanced Diploma

Duration of CMA

CMA is a 20 day intensive course. It is designed for the student to become an able, confident, and competent mortgage advisor. The student will learn the Good Advice process methodology. This unique programme is one of the first to be launched in the UK and is being recognised by major financial services organisation.

Course Contents

Unit 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
- assessment

Unit 2

- mortgage sourcing software – Trigold
- dash – 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 isa credit report?
- what is credit scoring?
- assessment

Unit 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

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LOCAL CONTACT

THE CMA COURSE

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- data protection act
- money laundering act
- prime vs. sub prime client assessment

Unit 4

- insurance products
- insurance quotation
- insurance application form
- sale skills:
- communicational skills
- answer telephone skills
- generation of appointments
- dealing with customers objections
- assessment

The Assessments

The assessments are based upon the students' competency and knowledge. To pass CMA you will undergo 4 progression assessments.

Technical Details

Qualification Name: Competency for Mortgage Advice (CMA)

Qualification Type: BTEC Advanced Award/Certificate/Diploma

Qualification Number: QAN Number: Pending

