



# International Degrees Ltd

Financial Training Academy Courses

From the Heart of the World's Main Financial Centre

The Financial  
Training  
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## MBSP

# Mortgage Back Office Support Programme

This Employer-Led qualification involves the following units to make up the entire qualification:

- Make selective use of IT
- Operate a computer
- Spreadsheet software
- E-mail
- Specialist/Bespoke software unit

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 in respect of mortgages in the workplace. The candidates will learn customer service skills as well as procedures and documentation required to comply with financial legislation; to obtain the best information for their clients; and to protect themselves and their employers.

Candidates will need to develop customer service skills in order to be able to conduct interviews with clients and properly assess their financial requirements. They will need to understand financial services legislation in relation to the role of financial advisor and know what needs to be disclosed to clients prior to giving advice. Candidates will experience completing a 'fact find' for clients and be able to take appropriate steps following a client interview.

**At the end of the training, candidates will gain a: NVQ Level 2 in IT Users (ITQ)**

### Duration of MBSP

MBSP is a 5 day intensive course. The Mortgage advice process is made up of many different elements. The CeMAP qualification is required to advice legally, but it does not

teach the would-be mortgage advisor the ins and outs of everyday work life in a professional environment.

In this unique NVQ programme you will learn not only the start of processing of a mortgage, but also how to incorporate key skills in accordance with your role.

### Course Contents

#### Make Selective Use of IT

- working out a monthly budget
- creating an equipment audit
- editing a photo for a poster or leaflet
- planning multiple web pages for a website

#### Spreadsheets software

- Handling files
- Combining information
- Entering and editing spreadsheet data
- Formatting spreadsheets
- Functions and formulas
- Improving efficiency

#### Email

- Sending and receiving
- Using address books and other facilities
- Formatting emails
- Exchanging information

#### Operate a Computer

- Setting up
- Accessing
- Using storage media
- Using tools and techniques

## International Degrees Ltd

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### LOCAL CONTACT

## THE MBSP COURSE Mortgage Back Office Support Programme



### **Bespoke Unit**

Mortgage sourcing software – Trigold  
DASH – mortgage software use

The bespoke unit is the special customised unit that changes the IT Based iTQ into a Mortgage based course. It involves the learning of Trigold, an industry leader for mortgage product sourcing and also an understanding of important areas within processing mortgages. This unit is the main unit within the iTQ as the other units will be taught in relation to Mortgage Advice and the bespoke unit.

### **The Assessments**

The assessments are based upon the students' knowledge. To pass MBSP you will undergo 5 assessments, 1 for each of the 5 modules

### **Technical Details**

**Qualification Name: Mortgage Back Office Support Programme (MBSP)**

**Qualification Type: IT Users (iTQ)**

**Qualification Number: QAN Number: 100/4217/9**

**NVQ Level: Level 2**

