

T LEVEL

Technical Qualification in Finance

The world of Financial Services

Finance is a key part to all our lives, be it personal or business. There are many different areas of finance you can progress to with exciting national and international opportunities, where the UK is the leading financial centre for institutions leading the way in innovation and setting of standards to secure the financial interests of people and organisations.

There is a recognised skills gap and huge opportunities for employment within the finance sector in many different organisations, leading to an exciting career which can focus on a range of different roles from insurance, to financial adviser, to retail banking or wealth management. Financial services play a key role in supporting individuals and organisations to manage their money, invest and cover their assets appropriately, contributing to a healthy growth economy for all, keeping within the legal framework given.



What is special about this qualification?

The Technical Qualification in Finance will give you the industry knowledge and skills required to start working within an organisation in your chosen specialism, across a range of different types of organisations from small financial services to large corporate ones. It will provide you with an up-to-date qualification aligned to industry standards and equip you with the confidence to enter employment successfully.



We designed this qualification alongside employers, including:

- ▶ Santander
- ▶ RU Group
- ▶ Ashton Lark
- ▶ SimplyBiz
- ▶ LGT Vestra

This means you will be acquiring the knowledge and skills that employers are looking for and enable you to start your professional career.

What will you learn?

The Technical Qualification in Finance is split into two parts (known as Components). The Core and the Occupational Specialism.

In the Core Component you will learn about the financial services industry and study the following topics:



Data driven innovation/ analytics and design thinking

Professional services

Research skills

Fundamentals of law

Project/ change management and administration

Fundamentals of financial accounting

Regulation

The financial services sector

Technology

Security and risk

Professionalism and ethics/ equality, diversity and inclusion

Regulation

The business environment

Careers within the finance and accounting professions

The Occupational Specialist Component is where you'll really get stuck in and develop the specific financial skills related to your chosen occupation specialism in preparation for your career in industry. There are four Occupational Specialisms to choose from:

Retail and Commercial Banking Analyst

In this component you will:

- ▶ Operate ethically and professionally in all interactions with customers/clients.
- ▶ Explain products and services in retail and commercial banking to internal and external customers/clients.
- ▶ Apply principles of risk management when making recommendations to internal and external customers/clients.
- ▶ Analyse financial information and data and present reports to internal and external.

Investment Banking and Asset and Wealth Management Analyst

In this component you will:

- ▶ Operate ethically and professionally in all interactions with customers/clients and counterparties.
- ▶ Explain products and services in investment banking to internal and external customers/clients and counterparties.
- ▶ Explain products and services in asset and wealth management to internal and external customers/clients.
- ▶ Apply principles of risk management in investment banking and asset and wealth management.
- ▶ Analyse financial information and data and present reports to internal and external customers/clients/counterparties.

Insurance Practitioner

In this component you will:

- ▶ Operate ethically and professionally in all interactions with customers/clients.
- ▶ Carry out with guidance the delivery of insurance services to customers/clients.
- ▶ Apply principles of risk management when making recommendations about insurance products and services to customers/clients.
- ▶ Research and analyse financial information and data and present reports to internal and external customers/client.

Financial Compliance/Risk Analyst

In this component you will:

- ▶ Operate ethically and professionally in all interactions with customers/clients.
- ▶ Communicate risk implications of products and services to internal and external customers/clients.
- ▶ Communicate regulatory implications of products and services to internal and external customers/clients.
- ▶ Investigate and analyse potential risk or regulatory issues and present finding.

How will I learn?

The T Level Technical Qualification in Finance is intended to be as practical as possible.

You will not only learn financial services skills in preparation for your career, but you'll also be undertaking lots of practical hands-on activities, project and tasks to give you the experience employers are looking for.

You will also enhance your broader skills in literacy and numeracy, which will be valuable in supporting progression in other areas. In addition, you will develop transferable technical and practical skills in communication (working with colleagues, customers and clients), research and project work, providing you with an opportunity to demonstrate your reflective practice.



What careers could this lead to?

The qualification is intended to help you progress into highly skilled employment in the financial services sector, with a focus on either banking, asset and wealth management, insurance services, or compliance risk.

Job roles open to you once you complete your T Level could include:

- ▶ Compliance Officer
- ▶ Risk Officer
- ▶ Financial Adviser.

If you've got an interest and passion in any of these areas, the T Level Technical Qualification in Finance could be perfect for you and help kickstart your career.

Could I still go to university?

Of course!

The T Level Technical Qualification in Finance is eligible for UCAS points, allowing you to continue your studies within the specialist area of financial services on degree programmes such as Business Finance, Financial Management, or Finance.

Or, you could progress onto an [Apprenticeship](#).



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