

Pearson have teamed up with the Chartered Insurance Institute (CII) to offer the opportunity to study towards a CII professional qualification in Financial Planning alongside the BTEC Extended Diploma in Business.

Studying towards a professional qualification will improve the prospects of securing a career with a clear progression route in Financial Planning or Insurance.

Select your pathway:

 **Certificate in Financial Services -**
General route

 **Apprenticeship in Financial Planning**

 **Certificate in Financial Services -**
Life & Pensions route

Pearson have teamed up with the Chartered Insurance Institute (CII) to offer the opportunity to study towards a Certificate Level CII professional qualification in Financial Planning alongside the BTEC Extended Diploma in Business.

The CII is the professional body for the Financial Planning and Insurance professions.

Studying towards a CII professional qualification will improve the prospects of securing a career with a clear progression route in Financial Planning or Insurance.

By choosing to study a CII Certificate unit in addition to the BTEC, progression is made towards a universally recognised professional qualification, sought after by employers in Financial Services and Insurance.

It's a real chance to start a rewarding career as there is a lack of new talent coming into these professions. Financial Planning and Insurance companies are actively looking for young people in particular to join their fields and there are great opportunities at entry level.

Further units will need to be taken after completion of the BTEC to complete the CII Certificate, but students will be well on their way to being a Financial Planning or Insurance professional.

[Learn more about the Chartered Insurance Institute and their Certificate Level qualifications](#)

Certificate in Financial Services - General route

Financial Planning & Financial Services study and career progression leading to an entry level role with credits towards a Certificate level professional qualification with the Chartered Insurance Institute (CII)



Administrator



Communicator



**Well organised
with an eye for detail**



IT skills



**Strong interpersonal
skills - team player**

Responsibilities

- Use a variety of software packages (including Microsoft Excel, Word, Access and Outlook, PowerPoint) to manage data and produce documents and presentations.
- Use content management systems (CMS) to maintain and update websites and internal databases.
- Keep diaries and arrange appointments.
- Book meeting rooms and conference facilities.
- Liaise with staff in other departments and with external contacts.
- Organize travel and accommodation for staff and other external contacts.
- Manipulate statistical data.
- Arrange in-house and external events.

Career Prospects

You can develop your career in a number of ways by progressing from an Administrator role to a Junior Paraplanner, then on to a Paraplanner or Financial Adviser.

Next role >

Customer Services Adviser



Communicator



Diplomacy



IT skills



**Strong
interpersonal skills**

Responsibilities

- Telephony - answering calls, emails and web chat enquiries from businesses, private or company investors, customers or members of the public.
- Customer Service - dealing with customer queries, customer payments, enquiries and complaints.
- Sales - advising about products and services.
- Supporting customers to fix computer problems, updating customers' records on computer databases.

Career Prospects

You can develop your career in a number of ways by progressing from a Customer Services role to a Team Leader or Management level role in Customer Services, or as a Paraplanner or Financial Adviser.

Next role >

Paraplanner



Responsibilities

- Modelling personal finance requirements.
- Researching consumer financial products.
- Implementing advice (processing applications or investment switches).
- Maintaining compliance knowledge in a regulated profession.

Career Prospects

Senior paraplanner or team leader, Practice Development Manager, Financial Adviser.

Financial Adviser



Communicator



Analytical



Entrepreneurial



Strong interpersonal skills

Responsibilities

- Acquiring and maintaining client relationships.
- Reviewing client needs.
- Researching products.
- Producing plans to achieve client objectives.
- Negotiating rates with financial product suppliers.
- Maintaining technical knowledge.
- Preparing financial reports.

Career Prospects

Senior adviser, team leader, business management, business ownership.

Apprenticeship in Financial Planning

Financial Planning & Financial Services study and career progression leading to an opportunity to undertake an Apprenticeship.



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Career Prospects

Senior adviser, team leader, business management, business ownership.

Certificate in Financial Planing - Life & Pensions route

Life & Pensions study and career progression leading to an entry level role with credits towards a Certificate level professional qualification with the Chartered Insurance Institute (CII)



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Contact us

For further information about this programme please contact Pearson

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 0845 373 0114

(Calls cost 3p per minute plus your phone company's access charge)

For further information regarding the Chartered Insurance Institute please contact

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