

## **5b. T Level in Finance**

### **The Progression Profile**

This T Level has four occupational specialisms: Retail and Commercial Banking Analyst; Investment Banking and Asset and Wealth Management Analyst; Insurance Practitioner; and Financial Compliance/Risk Analyst.

For these occupational specialisms, there are progression pathways into apprenticeships, education and work.

The T Level is based on an occupational standard. The occupational standard will have an apprenticeship option, which is referred to in the profile as the 'relevant occupation'.

For some apprenticeships, in particular the relevant occupation, a learner may have covered the content to a high level. They will not need to complete the apprenticeship in this step, this is noted as 'not applicable'. An apprenticeship may also be shortened due to recognised prior learning (RPL), this is noted as accelerated. Links to the mapping have been included which detail the areas in need of further development before full competence is reached in that occupation.

For work, whilst some roles may be accessed after completing the T Level, others are available after further training and gaining more experience. Please see below, the progression options for each occupational specialism.

#### **1. Retail and Commercial Banking Analyst Occupational Specialism**

For apprenticeships and technical qualifications at level 3, the relevant occupations Senior Financial Services Customer Advisor, Mortgage Adviser and Advanced Credit Controller and Debt Collection Specialist are being revised. Further information will be added once the revisions are finalised.

At level 4, there is the [Financial Advisor](#) apprenticeship.

At level 6, there is the [Financial Services Professional](#) apprenticeship.

Other progression options may include Business and administration.

For **education**, degree options may include Business Finance, Accounting and Finance, Business & Management with Accounting & Finance, Banking and Finance, and Economics and Finance.

For **work**, career progression could include: Collection agent; Asset Finance Specialist; Mortgage Advisor; Collections advisor; Stockbroker; Financial Advisor; Corporate Banking Manager

## **2. Investment Banking and Asset and Wealth Management Analyst Occupational Specialism**

For apprenticeships and technical qualifications at level 3, the relevant occupations are [Investment Operations Technician](#) and [Workplace Pensions \(Administrator and Consultant\)](#) (**not applicable**).

At level 4, there are the [Financial Advisor](#), [Paraplanner](#), and [Investment Operations Specialist](#) apprenticeships.

At level 6, there are the [Financial Services Professional](#) and [Professional Economist \(integrated degree\)](#) apprenticeships.

At level 7, there are the [Senior Investment and Commercial Banking Professional](#) and [Senior Professional Economist \(integrated degree\)](#) apprenticeships.

Other progression options may include Business and administration.

For **education**, degree options may include Business Finance, Accounting and Finance, Business & Management with Accounting & Finance, Banking and Finance, and Economics and Finance.

For **work**, career progression could include: Workplace Pensions Administrator, Stockbroker, Investment manager, Pension Consultant, Investment Consultant, Senior Research Analyst, Finance Worker Pensions Administrator, Senior Operations Manager

## **3. Insurance Practitioner Occupational Specialism**

For apprenticeships and technical qualifications at level 3, the relevant occupation is [Insurance Practitioner](#) (**not applicable**).

At level 4, there are the [Actuarial Technician](#), [Financial Advisor](#) and [Insurance Professional](#) apprenticeships.

At level 6, there is the [Senior Insurance professional](#) apprenticeship.

Other progression options may include Business and administration.

For **education**, degree options may include Business Finance, Accounting and Finance, Business & Management with Accounting & Finance, Banking and Finance, and Economics and Finance..

For **work**, career progression could include: Underwriter, Loss adjustor, Client relations, Junior broker, Insurance claims, Reinsurance Account handler

#### **4. Financial Compliance/Risk Analyst Occupational Specialism**

For apprenticeships and technical qualifications at level 3, the relevant occupation is the [Compliance and Risk Officer](#) apprenticeship (**not applicable**).

At level 4, there are the [Investment Operations Specialist](#) and [Junior Management Consultant](#) apprenticeships.

At level 6, there is the [Senior Compliance & Risk Specialist](#) apprenticeship.

Other progression options may include Business and administration.

For **education**, degree options may include Business Finance, Accounting and Finance, Business & Management with Accounting & Finance, Banking and Finance, and Economics and Finance.

For **work**, career progression could include: Compliance officer, Anti-money laundering specialist, Financial crime officer, Credit Management, Risk officer, Finance controller

# PROGRESSION PROFILE 1

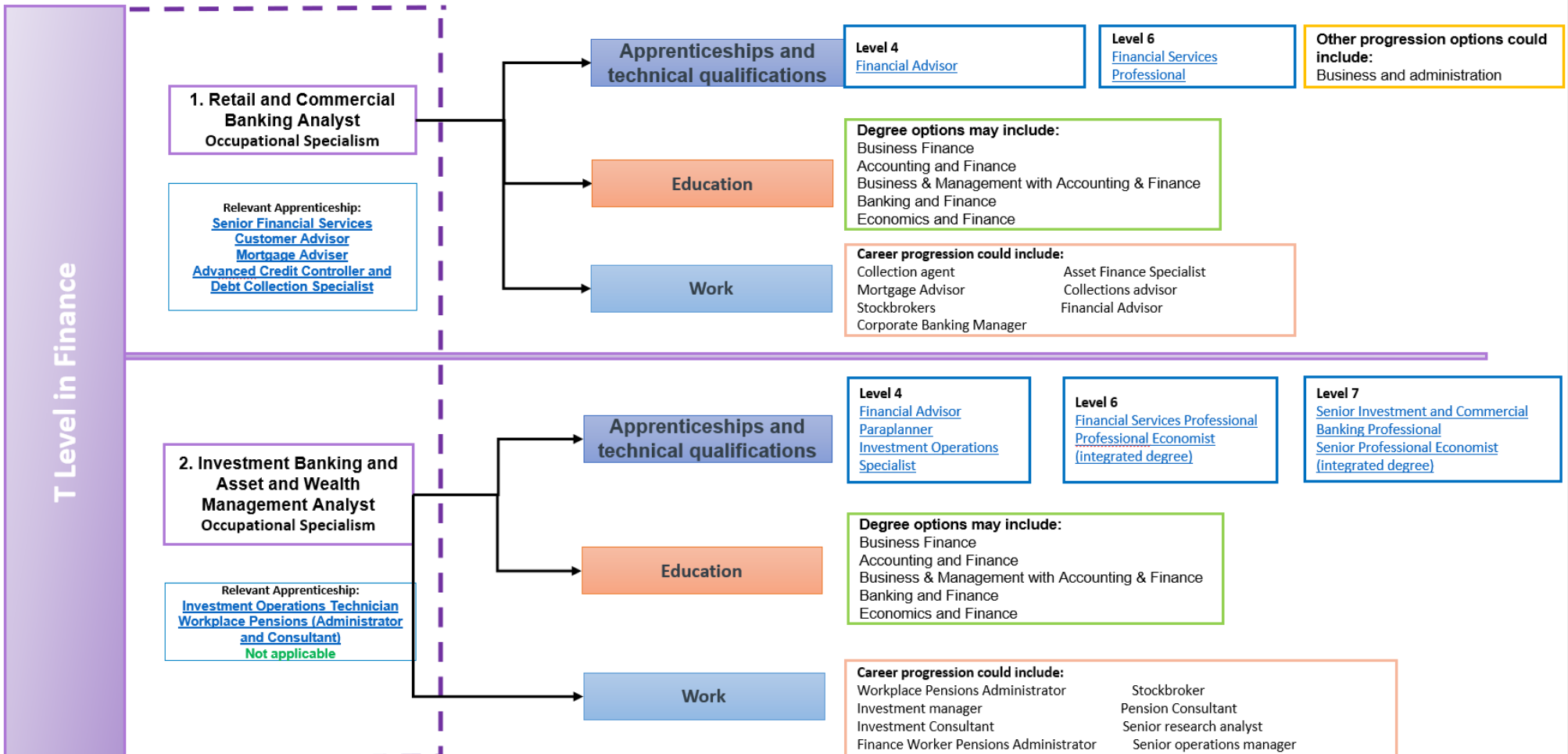
## T LEVEL IN FINANCE

**(Accelerated)** = May be shortened due to recognised prior learning (RPL)

**Not applicable** = The learner has covered the content to a high level and may bypass the apprenticeship in this step

**In development** = standard is being developed.

**Under revision** = standard is being revised.



# PROGRESSION PROFILE 2

## T LEVEL IN FINANCE

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