

Financial Services

Skills Council

Core Skills Signposting for SVQs in Providing Financial Services

Submission November 2009

Core Skills Signposting for SVQs Providing Financial Services

BANK AND BUILDING SOCIETY ACCOUNTS

Unit BBS01: Set up bank or building society accounts for customers

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit BBS02: Establish, monitor and maintain bank or building society accounts for customers

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit BBS03: Authorise financial transactions using telecommunications

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit BBS04: Operate a sterling counter till

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT and Working with Others at SCQF level 4.

Unit BBS05: Operate a multi-currency till

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit BBS06: Manage branch counter services

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit BBS07: Supervise the administration of retail financial products and services

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit BBS08: Process the transfer of foreign currency

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit BBS09: Process documentation for bank or building society accounts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy and ICT at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit IFP01: Communicate the practice and principles of Islamic banking to customers and colleagues

There will be opportunities in this unit for the development of Core Skills in Communication, and Working with Others at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit IO14: Build effective relationships with clients in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit IO15: Manage the business relationship with clients in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

FINANCIAL SERVICES CORE COMPETENCES

Unit FCC01: Develop yourself to improve and maintain workplace competence in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Working with Others and Communication at SCQF level 4.

Unit FCC02: Plan and organise your work in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FCC03: Develop productive working relationships in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Problem Solving, Working with Others, Communication and ICT at SCQF level 4.

Unit FCC04: Ensure you comply with regulations in your financial services environment

There will be opportunities in this unit for the development of Core Skills in ICT and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

FINANCIAL SERVICES CUSTOMER CARE

Unit FCS01: Provide callers with specialised assistance in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FCS02: Deal with customers by telephone in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

CUSTOMER PAYMENTS FOR FINANCIAL PRODUCTS AND SERVICES

Unit FCP01: Process customers' financial transactions

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FCP02: Assess and use financial information to reconcile accounts

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FCP03: Operate credit control procedures

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit FCP04: Prepare and pursue statements of account for financial products and services

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FCP05: Operate payment by instalments

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

GENERAL INSURANCE

Unit GIC01: Process straightforward new insurance claims notifications

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC02: Settle straightforward insurance claims

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC03: Deal with straightforward claims for insured losses

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC04: Deal with complex claims for uninsured losses

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC05: Process straightforward claims for uninsured losses

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC06: Deal with complex claims for insured losses

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC07: Carry out initial assessment and investigate complex insurance claims

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC08: Settle complex insurance claims

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIC09: Agree settlement of straightforward claims for uninsured losses

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GII10: Evaluate insurance products and services

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit GII11: Process straightforward insurance business as an intermediary

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT and Problem Solving at SCQF level 4.

Unit GII12: Process straightforward insurance renewals as an intermediary

There will be opportunities in this unit for the development of Core Skills in Working with Others, Communication, Numeracy, ICT and Problem Solving at SCQF level 4.

Unit GII13: Process straightforward mid-term insurance amendments

There will be opportunities in this unit for the development of Core Skills in Working with Others, Communication, Numeracy, ICT and Problem Solving at SCQF level 4.

Unit GII14: Process complex new insurance business as an intermediary

There will be opportunities in this unit for the development of Core Skills in Numeracy, Problem Solving, Communication, ICT and Working with Others at SCQF level 4.

Unit GII15: Process complex insurance renewals as an intermediary

There will be opportunities in this unit for the development of Core Skills in Numeracy, Problem Solving, Communication, ICT and Working with Others at SCQF level 4.

Unit GII16: Process complex mid-term insurance amendments

There will be opportunities in this unit for the development of Core Skills in Numeracy, Problem Solving, Communication, ICT and Working with Others at SCQF level 4.

Unit GII17: Evaluate risk and advise other insurance intermediaries

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GIU18: Underwrite straightforward new risks

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GIU19: Process insurance policy documentation

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GIU20: Process straightforward insurance renewals

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit GIU21: Underwrite complex new risks

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT and Working with Others at SCQF level 4.

Unit GIU22: Prepare insurance policy documentation for complex new business

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GIU23: Process complex insurance policy alterations

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GIU24: Process complex insurance renewals

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT and Working with Others at SCQF level 4.

Unit GIU25: Review underwriting decisions to accept risks

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GIU26: Underwrite straightforward policy alterations

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GFS02: Deal with requests to cancel financial services products or services

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

GENERAL TAKAFUL

Unit GTC01: Process straightforward new takaful claims notifications

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC02: Settle straightforward takaful claims

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC03: Deal with straightforward claims for takaful losses

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC04: Deal with complex claims for losses not covered by the takaful contract

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC05: Process straightforward claims for losses not covered by the takaful contract

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC06: Deal with complex claims for losses covered by the takaful contract

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC07: Carry out initial assessment and investigate complex takaful claims

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC08: Settle complex takaful claims

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTC09: Agree settlement of straightforward claims for losses not covered by the takaful contract

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit GTI10: Evaluate takaful products and services

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTI11: Process straightforward takaful business as an intermediary

There will be opportunities in this unit for the development of Core Skills in Numeracy, Working with Others, Communication, ICT and Problem Solving at SCQF level 4.

Unit GTI12: Process straightforward takaful contract renewals as an intermediary

There will be opportunities in this unit for the development of Core Skills in Working with Others, Communication, Numeracy, ICT and Problem Solving at SCQF level 4.

Unit GTI13: Process straightforward mid-term takaful contract amendments

There will be opportunities in this unit for the development of Core Skills in Working with Others, Communication, Numeracy, ICT and Problem Solving at SCQF level 4.

Unit GTI14: Process complex new takaful business as an intermediary

There will be opportunities in this unit for the development of Core Skills in Numeracy, Problem Solving, Communication, ICT and Working with Others at SCQF level 4.

Unit GTI15: Process complex takaful contract renewals as an intermediary

There will be opportunities in this unit for the development of Core Skills in Numeracy, Problem Solving, Communication, ICT and Working with Others at SCQF level 4.

Unit GTI16: Process complex mid-term takaful contract amendments

There will be opportunities in this unit for the development of Core Skills in Numeracy, Problem Solving, Communication, ICT and Working with Others at SCQF level 4.

Unit GTI17: Evaluate new takaful business and advise other takaful intermediaries

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GTU18: Underwrite straightforward new takaful business

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GTU19: Process takaful contract documentation

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit GTU20: Process straightforward takaful contract renewals

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GTU21: Underwrite complex new takaful business

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT and Working with Others at SCQF level 4.

Unit GTU22: Prepare takaful contract documentation for complex new business

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GTU23: Process complex takaful contract alterations

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GTU24: Process complex takaful contract renewals

There will be opportunities in this unit for the development of Core Skills in Numeracy, Communication, ICT and Working with Others at SCQF level 4.

Unit GTU25: Review underwriting decisions to accept takaful business

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit GTU26: Underwrite straightforward takaful contract alterations

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IFP02: Communicate the practice and principles of Takaful to customers and colleagues

There will be opportunities in this unit for the development of Core Skills in Communication, and Working with Others at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GFS02: Deal with requests to cancel financial services products or services

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

INVESTMENT OPERATIONS

Unit IO01: Prepare and present investment market information to stakeholders

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit IO02: Establish and maintain investor details and records

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit IO03: Reconcile investment market transactions

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit IO04: Maintain the custody of assets on behalf of the investor

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO05: Arrange the settlement of investment transactions

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO06: Measure the performance of investments

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO07: Establish the price of assets and investments/units

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO08: Supervise investment operations systems and processes

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO09: Process Trades (Global Settlement)

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit IO10: Assess and use financial information to reconcile stakeholder investment accounts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO11: Process corporate actions on behalf of investors

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit IO12: Process payments relating to stakeholder investment transactions or accounts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO13: Deal with complaints relating to financial services products and/or services

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO14: Build effective relationships with clients in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit IO15: Manage the business relationship with clients in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

FINANCING AND CREDIT

Unit FC01: Appraise and authorise applications for personal financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit FC02: Progress personal property financing applications

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC03: Charge and control securities for financing

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC04: Appraise applications for business financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC05: Progress and finalise applications for business financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC06: Monitor and review financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC07: Manage the quality of decisions to offer financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC08: Investigate arrears and recover debts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FC09: Process applications for financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit FC10: Process documentation for financing and credit facilities

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO14: Build effective relationships with clients in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

LIFE, PENSIONS AND INVESTMENTS

Unit LPI01: Process straightforward new life, pensions and investment business quotations

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit LPI02: Underwrite straightforward alterations to life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit LPI03: Process straightforward requests for payment against life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit LPI04: Authorise requests for payment against life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT and Working with Others at SCQF level 4.

Unit LPI05: Authorise the underwriting of life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit LPI06: Manage and develop the customer relationship to enhance the flow of financial services business

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit LPI07: Process documentation for straightforward life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy and ICT at SCQF level 4.

Unit LPI08: Process documentation for complex life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy and ICT at SCQF level 4.

Unit LPI09: Underwrite complex new life, pensions and investment business quotations

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

Unit LPI10: Underwrite complex alterations to life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit LPI11: Process complex requests for payment against life, pensions and investment contracts

There will be opportunities in this unit for the development of Core Skills in Numeracy, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit IO14: Build effective relationships with clients in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit GFS01: Provide information to customers in a financial services environment

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

ADMINISTRATION FOR MORTGAGE AND/OR FINANCIAL PLANNING INTERMEDIARIES

Unit MFP01	Provide an administrative service for mortgage and/or financial planning clients
	There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Problem Solving and Working with Others at SCQF level 4.
Unit MFP02	Process instructions for straightforward mortgage and/or financial planning business
	There will be opportunities in this unit for the development of Core Skills in ICT, Numeracy and Working with Others at SCQF level 4.
Unit MFP03	Contribute to reports for mortgage and/or financial planning clients
	There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy and Working with Others at SCQF level 4.
Unit MFP04	Facilitate an administrative service for mortgage/or and financial planning clients
	There will be opportunities in this unit for the development of Core Skills in Communication, Numeracy, ICT, Problem Solving and Working with Others at SCQF level 4.
Unit MFP05	Process instructions for complex mortgage and/or financial planning business
	There will be opportunities in this unit for the development of Core Skills in ICT, Numeracy and Working with Others at SCQF level 4.
Unit MFP06	Complete reports for mortgage and/or financial planning clients
	There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy and Working with Others at SCQF level 4.
Unit MFP07	Supervise mortgage and/or financial planning administrative systems and processes
	There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Problem Solving and Working with Others at SCQF level 4.
Unit GFS01	Provide information to customers in a financial services environment
	There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

FINANCIAL SALES PROCESS

Unit FSP01: Promote the organisation's additional financial products and services

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Unit FSP02: Develop and maintain business relations with financial services' introducers

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit FSP03: Process financial services' sales support administration for agencies

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Working with Others at SCQF level 4.

Core Skills Signposting for SVQs Providing Financial Services

DEBT COLLECTIONS

Unit DC01: Obtain and validate credit information to instigate debt collections

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy and Working with Others at SCQF level 4.

Unit DC02: Agree a way forward on repayments with the debtor

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit DC03: Negotiate repayment solutions to outstanding debts

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy, Working with Others and Problem Solving at SCQF level 4.

Unit DC04: Authorise financial transactions using telecommunications

There will be opportunities in this unit for the development of Core Skills in Communication, ICT and Numeracy at SCQF level 4.

Unit DC05: Handle telephone calls with debtors in an effective way

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Working with Others and Problem Solving at SCQF level 4.

Unit DC06: Monitor and safeguard debt repayment arrangements

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy and Working with Others at SCQF level 4.

Unit DC07: Administer the debt collections process

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy and Working with Others at SCQF level 4.

Unit DC08: Oversee and maintain the effectiveness of the debt collections process

There will be opportunities in this unit for the development of Core Skills in Communication, ICT, Numeracy, Working with Others and Problem Solving at SCQF level 4.
