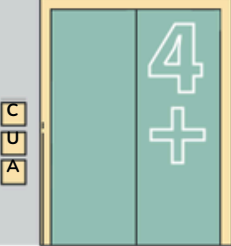


Financial Services

Elevate your career through college/ITP*, university, or an apprenticeship



	Job Roles (can include)	Skills (can include)	Knowledge and Behaviours (can include)
Level 4+ Senior Management 	• Senior Manager/Director • Senior Financial Advisor • Self-Employment 	• Build sound and trusted client relationships • Carry out activities using systems and processes • Contribute to development of strategic plans • Evaluate information quickly with accurate conclusions	• Deep understanding of financial services structure • Deep understanding of legal and regulatory framework • Display energy, determination, and enthusiasm • Demonstrate excellent attention to detail
Level 4 Junior to Middle Management 	• First Line Manager • Financial Advisor • Para Planner • Technical Specialist 	• Make decisions confidently • Proactively and regularly meet company standards • Create new business opportunities • Be proficient in using IT systems	• Structure of the financial services market • Understand client "needs and objectives" • Demonstrate professional and ethical attitude • Demonstrate a proactive "can do" attitude 
Level 3 Experienced to Supervisory 	• Bank/BS Cashier • Insurance Advisor • Call Centre Worker • Admin Support 	• Develops and delivers excellent customer service • Develop effective relationships • Plan and prioritise business outcomes • Adhere to systems and processes 	• Broad understanding of financial services • Understands legal frameworks • Understands products • Demonstrate adaptability, honesty and enthusiasm 
Level 2 Entry level employment to intermediate 	• Bank/BS Cashier • Insurance Advisor • Call Centre Worker • Admin Support 	• Delivers excellent customer service • Use company systems and processes • Support colleagues • Build relationships with customers 	• Solve problems • Improve performance and service • Understanding of legal frameworks • Understands systems, tools and processes