

Investment Operations Specialist.

Level 4 Professional Career Development Programme



Duration

18 months



Qualification achieved

Chartered Institute of Securities and Investment (CISI) Investment Advice Diploma (IAD)



Entry requirements

- A minimum of 3 A-Levels and GCSE grade C or above in English language and mathematics

You must be employed in a role relevant to this programme to be eligible to apply.



Eligibility criteria

- Your current role should be UK based and you must have lived here for at least three years
- The programme must address development needs in your current role
- Your Line Manager must be able to support you throughout the programme

See thenatwestgroup.bppuniversity.ac.uk for full details.



Cost

This programme is funded centrally by the Apprenticeship Levy. Your business area will have to fund travel and expenses to attend any face-to-face workshops and any exam resit costs. You will not have to pay anything personally to study this programme.

Is this for you?

An Investment Operations Specialist works in the administrative areas of the financial services sector engaging in investment management, trading and reporting activities. This is a fast-paced environment that operates under tight regulations and compliance laws. You will develop a wider understanding of industry and how your organisation fits within it as well as how your role impacts the sector.

Through this programme you will develop core knowledge and understanding to develop your professional competency. Completing professional development activities will ensure you develop your professional skills readying yourself for more senior roles and responsibilities in the future.

The IAD professional qualification will provide foundation knowledge in UK financial services and consumer relationships, macro-economic environment, settlement, safe custody and prime brokerage, exchange traded futures and options and financial protection.

Typical job roles include those advising and/or dealing in Securities or Derivatives, or advising on Retail Investment Products and Friendly Society Tax-Exempt Policies and/or Managing Investments.

What will you learn?

- UK financial services and consumer relationships
- Macro-economic environment
- Settlement
- Safe custody and prime brokerage
- Exchange traded futures and options
- Financial protection

Commitment from you

You will need to dedicate time during working hours to complete this programme. This will include:

- Attendance at webinars
- Independent study and research
- Applying, reflecting and recording what you've learnt back at work

The amount of time required each week may vary depending on your programme workload. Full details on the weekly time commitments are available in the Learning Plan ([click to download](#)).

For more information contact BPP:

pcdp@bpp.com

thenatwestgroup.bppuniversity.ac.uk

Progression upon completion

Upon successful completion you will be able to progress onto the Financial Services Professional Level 6 Professional Career Development Programme.

How we support you

- You will be taught by experienced tutors who have worked in your industry
- You will have access to a Coach who is on hand to guide you through each stage of your learning journey, providing you with clear aims and objectives

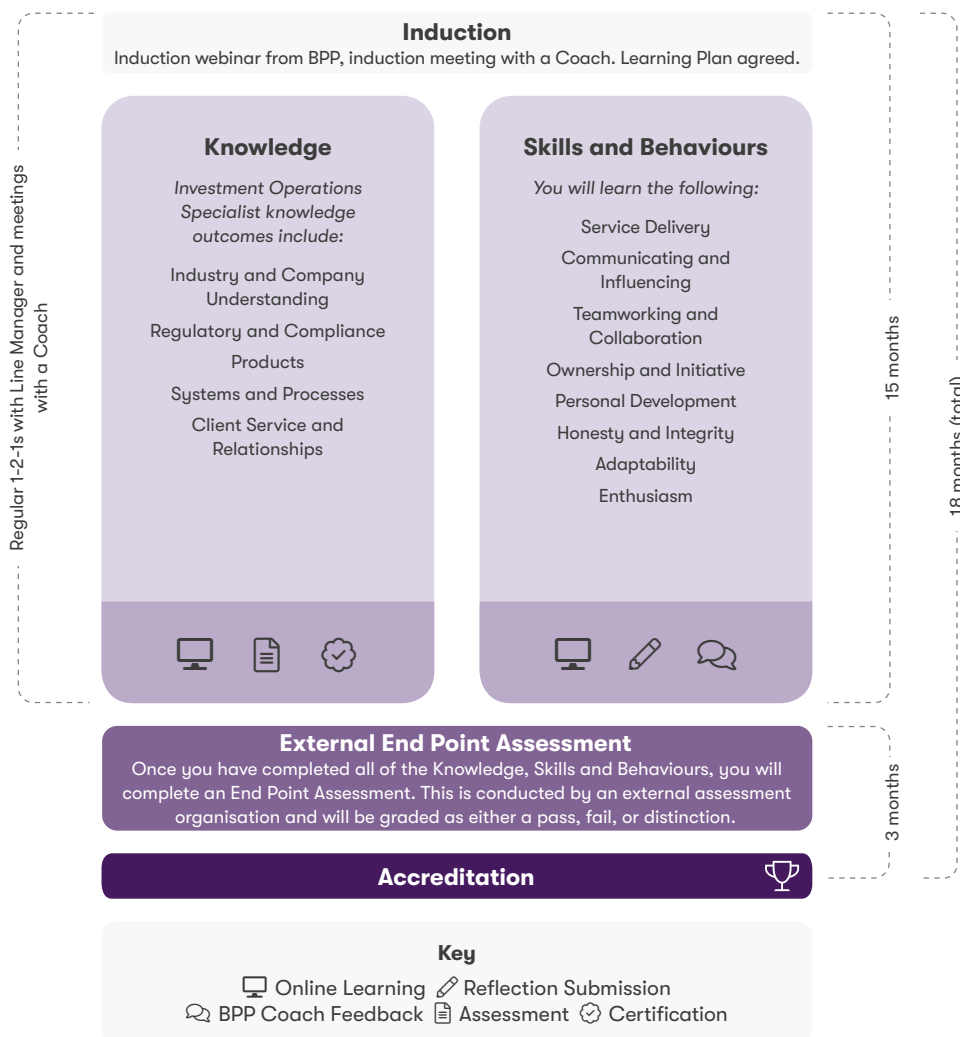
- You will have access to a Virtual Learning Environment with all of your qualification content, additional learning resources and all the step-by-step support you need to be successful on this programme

How do you apply?

- Speak to your Line Manager to ensure you have their support. Discuss the expected time commitment required during working hours and refer them to the people manager guide available on the PCDP portal
- Click **here** to apply online. You and your Line Manager will be asked to confirm you meet the eligibility criteria and that you can apply the learning in your current role

How is your programme structured?

This programme combines the knowledge from a professional qualification with the skills you'll need to demonstrate professionalism in your current role.



For more information contact BPP:

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