



More than just a qualification

Your new career starts here



What we'll cover

1. Getting you qualified

An overview of the curriculum and the qualification you'll gain _____ **4**

Bridging programme _____ **5**

2. Developing you as an adviser

Adviser development _____ **6**

The 'Quilter way' _____ **8**

Continuing your development as an adviser _____ **9**

3. Becoming a competent adviser

Giving advice _____ **10**

Developing your skills _____ **10**

Developing your knowledge _____ **10**

Developing your business _____ **10**

4. Supporting you to build your own business

Dedicated support from Quilter _____ **11**

Guaranteed enquiries _____ **11**

*From classroom
to clients.*



Get more than just a qualification with the Quilter Academy

A career in financial advice can be extremely rewarding, both financially and in terms of job satisfaction. You can build your own secure financial future knowing you are helping other people plan for theirs.

The Quilter Academy is the perfect place for you to start your career as a financial adviser. Not only will you gain the qualifications you need to become a financial adviser, we give you the full support you need to start building your own business.

At the end of our academy programme, you'll have the opportunity to join our advice business, Quilter Financial Advisers, as a self-employed adviser. So, you can enjoy the autonomy of running your own business, with the support of an ambitious award-winning FTSE 250 company behind you.

You don't need to have any experience in financial services or any specific qualifications to apply. But you do need:

- ✓ the determination and self-discipline to study hard
- ✓ a good work ethic
- ✓ an aptitude for learning
- ✓ to be self-motivated
- ✓ to have a desire to succeed
- ✓ to believe in yourself
- ✓ the ability and willingness to network
- ✓ to be people orientated, outgoing and like to engage with new people.

Think you've got what it takes? We'd love you to join us.



Getting you qualified



6 months

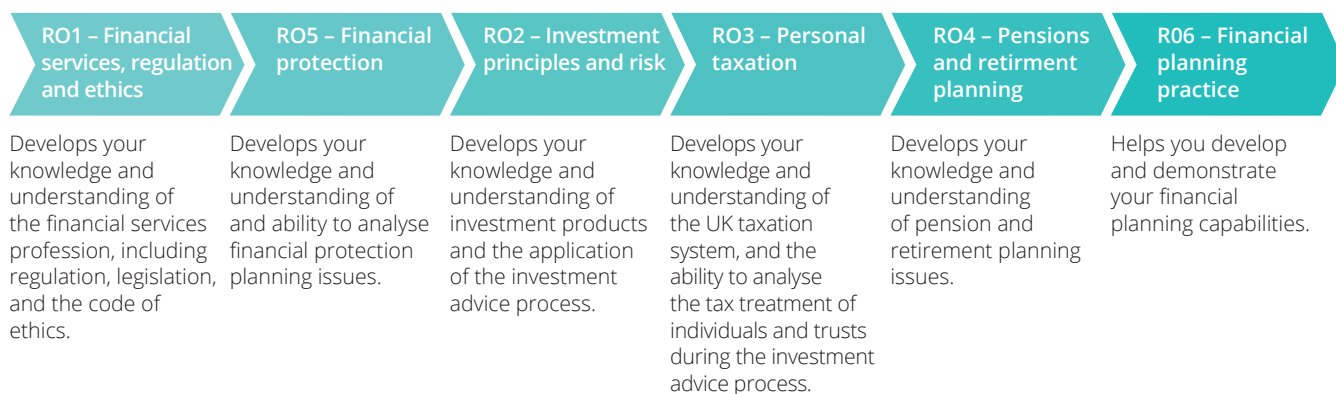
Stage 1: Your academic journey

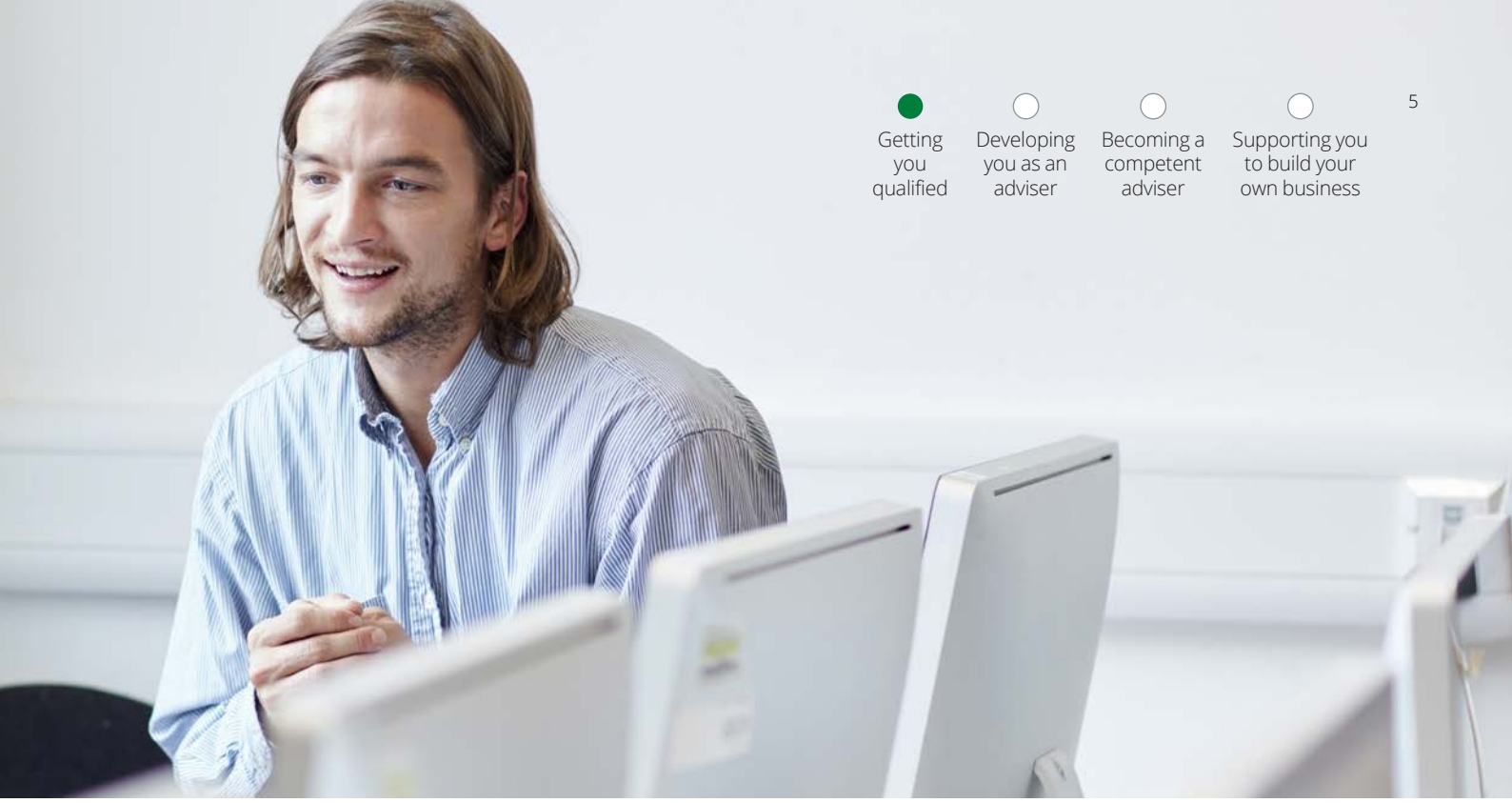
An overview of the curriculum and the qualification you'll gain

The Quilter Academy will help you become a fully qualified financial adviser, giving you the foundation on which to build a sustainable business for yourself.

The first six months of the programme will give you the core technical knowledge you need to gain the Level 4 Diploma in Regulated Financial Planning from the Chartered Insurance Institute. This means you'll have the qualification needed to be a qualified financial adviser when you complete your training in the Academy.

This stage of the programme consists of six modules:





How the modules are delivered

Each module is delivered through a mixture of self-study, regular online surgeries and revision workshops. You'll be told the times for each session, so all you need to do is dial in.

As this is a full-time course, you will need to plan and allow plenty of study time each day and attend all sessions to increase your chances of success. If for unforeseen reasons you can't attend one of the sessions, don't worry - they are all recorded and we can send you a link on request.

All learning sessions are delivered via our dedicated learning management system. This will also give you access to revision material and study aids.

Help with funding

We can help you fund your training and transition into becoming a financial adviser. We offer a funding package that will last up to 18 months whilst you gain qualifications and build your business.

Bridging programme

If you've already achieved your level 4 diploma in financial advice but have not worked as a financial adviser, we can help. Our 13 week bridging programme is designed to give you all the skills you need to launch your career as a financial adviser. The course will cover essential topics including:

- ▶ questioning techniques
- ▶ client psychology
- ▶ regulatory documents
- ▶ business planning
- ▶ live environment simulation
- ▶ systems and documentation
- ▶ compliance and report writing
- ▶ administration and research.

You are able to receive income funding and, on successful completion of the course, will then join Stage 2 of our Quilter Academy programme.

Developing you as an adviser



6 weeks

Stage 2. Adviser development (Level 1)

As soon as you have finished your exams, you'll start the second stage of the programme, so you'll be on track to becoming a successful adviser as soon as possible.

Over 6 weeks, you will build on the academic and technical knowledge you've gained through studying for your qualifications, by developing the wider skills you'll need as a financial adviser. This covers three key areas:



The modules are delivered through a mix of video training and self-study, as well as live webinars run by our experienced Quilter Academy training and development consultants. You can test your learning as you go by taking online tests and quizzes.

At the end of each module, you'll have a personal check-in with a consultant to see how you are getting on. You can discuss your wellbeing and let them know if you need further support in any areas.



1

Business development – Week 1

- ✓ How to write a business plan.
- ✓ How to generate business and build your client bank.

What you'll learn:

- ▶ the importance of trust and how to build it with clients
- ▶ the principles of business planning
- ▶ networking and pitching with impact
- ▶ using social media effectively and compliantly
- ▶ how to run a self-employed business
- ▶ emotional intelligence, personal resilience, and wellbeing.

2

The Quilter proposition – Week 2

- ✓ Understand the Quilter Financial Planning proposition.
- ✓ How to apply it in various client scenarios.

What you'll learn:

- ▶ the importance of protection advice
- ▶ identifying the right protection solution
- ▶ advising on investment objectives
- ▶ investment risk and sustainable investing
- ▶ advising on retirement planning
- ▶ 'at retirement' strategies.

3

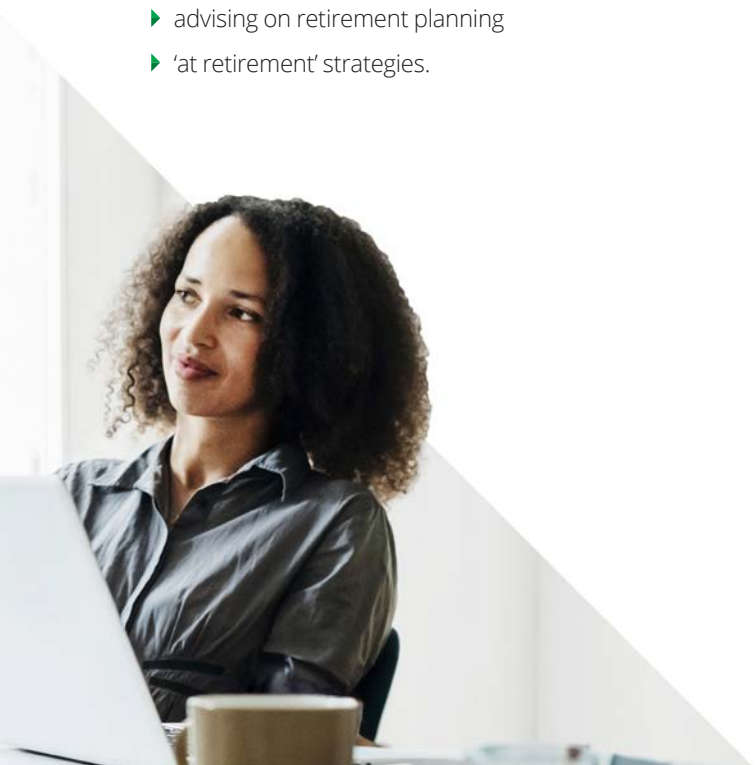
Adviser skills – Weeks 3-5

- ✓ Develop the skills you'll need as a financial planner throughout the advice process.

What you'll learn:

- ▶ an overview of the skills you'll need:
 - the process we follow at Quilter
 - how to establish needs, identify priorities and present options
 - introduction to the technology we use
- ▶ how to prepare for and hold client conversations
- ▶ how to undergo a financial review meeting:
 - building rapport
 - the fact-finding model we use at Quilter
 - questioning techniques
- ▶ how to summarise and close a client meeting
- ▶ how to construct and present your advice and recommendations.

This stage of the programme will teach you how to put the theory you've learnt into practice and give you further insight into the role of an adviser. It will give you a good foundation for the next stage in your training: learning how to do things the 'Quilter way'.



Stage 3. Learning how to do things the 'Quilter way'



2 weeks

To ensure our clients receive a consistently high standard of service from our advisers, we have a robust advice process in place. You'll learn about this in detail, and get to know to know the technology systems we have in place to manage clients efficiently.

This stage of the programme will be delivered through a series of live webinars, along with some self-study.

What you'll learn:

- ▶ how we support advisers
- ▶ how to establish client needs and gauge their attitude to risk
- ▶ how to prepare documentation, including suitability reports
- ▶ how to present your recommendations
- ▶ how to review clients
- ▶ how to advise on protection products
- ▶ the role of putting policies in trust
- ▶ how to use the systems we have in place to manage clients.

We'll help prepare you for life as an adviser through a series of assessed role plays. You will receive constructive feedback on these, identifying what you have done well, and what you can do even better.

You'll also sit a multiple-choice exam to test your learning.



You have now taken all the tests and assessments required to move onto the final stage of the programme.



○
Getting
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qualified

●
Developing
you as an
adviser

○
Becoming a
competent
adviser

○
Supporting you
to build your
own business

9

Stage 4. Continuing your development as an adviser (Level 2)



6 weeks

The final stage of the programme allows you to consolidate all the knowledge you've gained so far, and to prepare you to start building your financial advice business and engaging with clients.

You will be allocated a dedicated field coach and a support manager who will both provide you with one-to-one support.

Getting you ready to see clients

What you'll accomplish:

Business development

- ✓ Understand how to handle enquires generated through our unique 'affinity' programme.
- ✓ Finalise your business plan.
- ✓ Complete your biography and social media profiles.

The Quilter proposition

- ✓ Progress your understanding of how Quilter supports you and your clients.
- ✓ Understand your target market for clients and how you can help them.
- ✓ Practice how to articulate Quilter's proposition.

Readiness to engage

- ✓ Complete the setup of advice related systems you'll be using.
- ✓ Prepare your own meeting packs for use with clients.
- ✓ Understand how to engage digitally with clients.
- ✓ Understand how to use paraplanning support.

Adviser skills

- ✓ Practice how to approach prospective clients.
- ✓ Practice how to articulate the process, and value, of giving advice.
- ✓ Practice how to identify client needs and objectives.



Congratulations! Once authorised as a financial adviser, you will be ready to start helping clients plan their financial futures.

○
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●
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Becoming a competent adviser

Once you are authorised as a financial adviser, your development doesn't end there. The Quilter Academy will continue to support as you progress towards becoming a fully competent adviser (known as Level 3). Lasting 26 weeks, you will work one-to-one with your field coach to embed and enrich your adviser skills.

During this period of additional support, you will:

- ✓ start implementing your business plan
- ✓ start applying your skills and knowledge
- ✓ demonstrate meeting adviser competencies and key performance measures
- ✓ achieve 'Competent Adviser Status' (CAS).

We provide additional support to you in four key areas:



Giving advice

You'll be supported in the following aspects of giving advice to clients:

- ✓ Quilter proposition
- ✓ advice process
- ✓ advice suitability.



Adviser skills

You'll practice, and be able to apply, the following skills:

- ✓ quantifying client needs and objectives
- ✓ gaining commitment from clients
- ✓ delivering an ongoing advice service.



Developing your knowledge

Building on technical knowledge you've gained from your time with the Quilter Academy, you'll learn about additional aspects of advice such as:

- ✓ the corporate market
- ✓ protection
- ✓ our 'valued adviser' framework
- ✓ technical foundations, including investments and tax shelters.



Developing your business

You'll benefit from personal mentoring sessions. You'll also have progress checks to make sure your business development plan is on track. And you'll be able to review your activity and see how many leads you've managed to convert into clients.

The feedback you'll receive will build your confidence and give you the support you need to make your business a success.

Supporting you to build your own business within Quilter

Once you are authorised as a financial adviser, you will join our national advice business, Quilter Financial Advisers.

Dedicated support from Quilter

Running your own business brings a range of benefits from giving you control over your future, opportunity to generate an excellent income, the ability to build a good work-life balance, to having the satisfaction of building something of value for your retirement.

Building a business can seem daunting. Don't worry, you'll have our full support.

- ▶ **Dedicated, personalised support.** You'll have a dedicated support manager and a field coach. Plus, you'll have the support of the wider firm, including highly skilled management and support teams and access to mentors.
- ▶ **Dedicated development.** Quilter has a robust infrastructure which will support you in your career development.
- ▶ **Dedicated marketing support.** You'll have access to approved tools and templates created by marketing specialists. You'll also benefit from marketing activity that's driven by the wider Quilter business.

Guaranteed enquiries

A unique benefit of joining Quilter Financial Advisers is that you will have guaranteed enquiries. These are generated through our relationships with over 35 national affiliate organisations (such as unions) who partner with us to offer advice to their employees or members.

We guarantee 100 new enquiries to each Quilter Academy graduate in your first 12 months, for you to engage with, offer support and promote your service.

Subject to you completing our internal assessments.

A respected and ambitious company

At Quilter, we have a long history of providing excellent financial advice and high- quality products and services designed to help people get sound financial plans in place.

We're known for advocating for financial advice and supporting those who give it. In fact, we've built our whole business around the value and importance financial advice has in people's lives. We pride ourselves on doing the right thing for our clients and advisers.

Our deep knowledge and expertise mean we are one of the most respected financial services companies in the UK.

Your next steps

If you are interested in studying through the Quilter Academy, then just get in touch. We'd love to hear from you.



quilteracademy@quilter.com



We run regular webinars which give you further insight into what the Quilter Academy offers. You can sign-up via our website:
quilter.com/academy