

WEALTH MANAGEMENT LEVEL 5 PROGRAMME 2017/2018

UNIT STANDARD TITLE	ID	TYPE	LEVEL	CREDITS
SKILLS PROGRAMME 1				
Apply the principles of ethics to a business environment	230078	Core	Level 6	10
Apply basic economic principles to the financial services sector	230071	Fundamental	Level 5	5
Demonstrate knowledge and understanding of the fundamental principles of risk finance in order to propose an insurance solution	242562	Elective	Level 5	5
Demonstrate knowledge and understanding of risk in a Financial Services environment	119997	Fundamental	Level 5	5
Research theories of behavioural economics and behavioural finance to explain the influence of emotion on financial decisions	242557	Elective	Level 6	4
Total Credits				29
SKILLS PROGRAMME 2 - LEGISLATION & PERSONAL LINES INSURANCE				
Apply a researched trend to individual financial risk	242601	Core	Level 5	5
Apply knowledge of the different asset classes in order to give financial advice	242594	Core	Level 5	4
Research information in order to assist in conducting a financial risk assessment	242554	Core	Level 5	7
Demonstrate knowledge and insight into the changing nature of the financial services industry and its consumers	230075	Fundamental	Level 5	6
Describe the financial life cycle of an individual and how this influences financial decisions	230077	Fundamental	Level 5	8
Total Credits				30
SKILLS PROGRAMME 3				
Apply scenario planning to explain potential risk in a specified financial services context	242580	Core	Level 5	6
Determine the needs and wants of an entity in order to propose an appropriate financial solution	242573	Core	Level 5	4
Present a proposal to optimise the tax aspects of the wealth management of an entity	242574	Core	Level 5	4
Apply technical knowledge and skill to advise business entities on insurance and group retirement benefits	242597	Elective	Level 6	5
Apply knowledge of estate planning to propose a financial solution for a specific client	242603	Elective	Level 5	8
Apply technical knowledge and skill to advise an individual on planning for retirement	242613	Elective	Level 5	5
Total Credits				32
SKILLS PROGRAMME 4				
Analyse the product design/structure of different medical schemes to evaluate the benefits of each scheme	242567	Elective	Level 5	5
Apply knowledge and skill to explain the application of structured long term insurance portfolios	242590	Elective	Level 5	6
Present an informed argument on a current issue in a business sector	230070	Fundamental	Level 5	5
Apply knowledge of health economics to make an informed decision	242571	Elective	Level 6	3
Demonstrate insight into current affairs in the Financial Services sector	120075	Fundamental	Level 5	10
Total Credits				29

