

The Insurance Practitioner Apprenticeship

Work Practice Assessment

Financial Adviser

In partnership with



Ollscoil
Teicneolaíochta
an Atlantaigh

Atlantic
Technological
University



The
Insurance
Institute



GENERATION
APPRENTICESHIP
www.apprenticeship.ie

Apprentice Name

Year Started

Employer Name

Period of Review

Work Task	Supervisors Assessment	Supervisors Comments on Apprentice Performance
Can demonstrate an understanding of Financial Planning by outlining the 5 stage financial planning advisory process	EXCELLENT GOOD FAIR	
Can demonstrate knowledge of the “know your client” procedures by clarifying how a vulnerable client is identified	EXCELLENT GOOD FAIR	
Is able to articulate basic elements of product offering / financial advice to customers with minimal use of jargon	EXCELLENT GOOD FAIR	
Has the knowledge of the company’s requirements to comply with the Consumer Protection Code’s complaints procedures	EXCELLENT GOOD FAIR	
Has the ability to progress negotiations (internal and external) to ensure effective renewal or new business acquisition	EXCELLENT GOOD FAIR	

Insert your own...

- EXCELLENT
- GOOD
- FAIR

Supervisor Summary

OVERALL RATING	COMMENTS
EXCELLENT	
GOOD	
FAIR	

SUPERVISOR

I confirm thathas successfully completed the Financial Adviser work based tasks above to a competent level and is ready to proceed to the next stage of the apprenticeship programme.

Signed (Supervisor)

Role in Company

Date

APPRENTICE

Signed (Apprentice)

Date

Date scanned copy uploaded to Moodle: