Level 3 Mortgage Adviser

10 MONTHS
PRACTICAL LEARNING

2 MONTHS
ASSESSMENT PERIOD

CII R01 + CF6
QUALIFICATIONS

4 CHECKS / 3 TASKSETS
WORKPLACE EVIDENCE

348 HOURS
PLANNED OFF-THE-JOB

01-08 | FOUNDATIONS, CII R01 & CF6 QUALIFICATIONS

Read left to right, then continue below

MONTH 01 — FOUNDATIONS

Adviser role & R01 start

- Mortgage market, products and advice process
- R01 introduction and Chapters 1-2

PLANNED OTJT - 30 Hrs
Welcome check-in (W4)

MONTH 02 — R01 STUDY

R01 | Regulation

- Chapters 3-6: legal concepts and FCA Handbook
- R01 Seminar 1, Chapters 1, 4 & 5

PLANNED OTJT - 34 Hrs
Monthly OTJT log

MONTH 03 — R01 STUDY

R01 | Applying principles

- Chapters 7-11: advice, conduct and ethics
- R01 mock examination (W12)

PLANNED OTJT - 34 Hrs
Progress review (W10)

MONTH 04 — R01 EXAM

R01 | Exam & customer care

- R01 masterclass (W13) and exam (W14)
- Supporting vulnerable customers (W15)

PLANNED OTJT - 23 Hrs
R01 examination (W14)

MONTH 05 — CF6 STUDY

CF6 | Mortgage foundations

- CF6 workshops: Chapters 1-5
- Building technical mortgage advice knowledge

PLANNED OTJT - 18 Hrs
Progress review (W20)

MONTH 06 — CF6 STUDY

CF6 | Technical practice

- CF6 workshops: Chapters 6-10
- Managing risk and customer dissatisfaction

PLANNED OTJT - 20 Hrs
K&S Check 1 (W25)

MONTH 07 — CF6 STUDY

CF6 | Applied advice

- CF6 Chapters 11-14 and exam preparation
- Technology in the mortgage industry

PLANNED OTJT - 22 Hrs
Taskset 1 (W29)
Progress review (W30)

MONTH 08 — CF6 EXAM

CF6 | Exam & evidence

- CF6 mock (W31) and masterclass (W32)
- Study record and CF6 examination (W33)

PLANNED OTJT - 121 Hrs
K&S Check2(W31)
CF6 examination (W33)

09-12 | OCCUPATIONAL PRACTICE & APPRENTICESHIP ASSESSMENT

Professional qualification routes to the right

MONTH 09 — PRACTICE

Responsible practice

- Sustainable mortgage practice
- Mortgage adviser role-play preparation

PLANNED OTJT - 18 Hrs
Taskset 2 (W35) K&S Check 3 (W38)

MONTH 10 — PRACTICE

Role-play readiness

- Fourth knowledge and skills check (W40)
- Mock mortgage adviser role play (W42)

PLANNED OTJT - 14 Hrs
Progress review(W40)
Taskset 3 (W42)

MONTH 11 — ASSESSMENT

Assessment period

- First month of the planned assessment period
- OTJT record scheduled at W47.3

PLANNED OTJT - 14 Hrs
Assessment dates will be confirmed

MONTH 12 — ASSESSMENT

Assessment & completion

- Second month of the planned assessment period
- Apprenticeship assessment can occur during training

KEY CHECKPOINT
Assessment dates will be confirmed

YOUR PROFESSIONAL QUALIFICATIONS

CII R01 — MONTHS 01-04

Financial Services, Regulation and Ethics

- Chapters 1-11 and taught seminars
- Mock W12 | Masterclass W13

EXAM | WEEK 14

CII CF6 — MONTHS 05-08

Mortgage Advice

- Workshops covering Chapters 1-14
- Mock W31 | Masterclass W32

EXAM | WEEK 33

Both CII modules are planned within the practical training phase; individual exam bookings may vary.

QUALIFICATIONS & APPRENTICESHIP ASSESSMENT

R01 W14 | CF6 W33 | 4 checks and 3 tasksets

CII R01 QUALIFICATION — CII R01
Regulation and ethics
Mock W12 | Masterclass W13 | Exam W14

CII CF6 QUALIFICATION — CII CF6
Mortgage Advice
Mock W31 | Masterclass W32 | Exam W33

KNOWLEDGE & SKILLS CHECKS — 4 CHECKS
Four development checkpoints
Check 1 W25 | 2 W31 | 3 W38 | 4 W40

APPRENTICESHIP TASKSETS — 3 TASKSETS
Workplace portfolio evidence
Taskset 1 W29 | 2 W35 | 3 W42

THROUGHOUT THE PROGRAMME Monthly OTJT logs; progress reviews in Months 3, 5, 7 and 10. Assessment activities may take place on programme.

© Skills Edge Training Ltd 2026 | skillsedge.co.uk