

## Career Development Plan: Financial Services Administrator

Objective: Attain a position as an Administrator in Life and Pensions, Mortgages or General Insurance.

Skills Category	Ref	Job Requirement	Training Required	Estimated Duration (days)	Training Achieved	Relevant Experience	Comment
		<i>This column should describe the job requirement which I am planning to train-up for.</i>	<i>This column should describe the training you will do to give you the knowledge and skills to meet the job requirement.</i>	<i>Estimated time in days to complete training required.</i>	<i>This column should list the training that has been achieved before deciding to pursue this occupation.</i>	<i>This column should list the experience gained from college or employment which satisfies job requirement.</i>	
Academic Skills	1.	QFA qualified or studying towards final exams.	Study QFA Part 1 – 6 – Course Fee E2,000  QFA – Life Assurance QFA – Pensions QFA – Investment QFA – Loans QFA – Regulation QFA – Financial Planning  See <a href="#">LIA website - QFA or Fitzwilliam Institute</a>				
	2.	Learn about accounting systems so that it will be of benefit in Admin work while you would also be training for higher level role.  Note: This course maybe more relevant to pursuing Accounts Assistant Job as entry to career in this area.	1) <a href="#">Introductory Certificate in Financial and Management Accounting</a> at eCollege – free to Jobseekers				
	3.	Providing administrative support to the Mortgages and Associated Insurances Department	1) QFA Module – Loans See <a href="#">LIA website - QFA</a> 2) Check out websites of company that sell mortgages				
	4.	Provide Pensions Administrative Support	1) QFA Module – Pensions See <a href="#">LIA website - QFA</a>				
	5.	Provide General Insurance	1) Professional Certificate in				

		Administrative Support	General Insurance – See <a href="#">LIA Website</a>				
Financial Product Information and Industry News.	6.	Keep up to date with Industry Developments with Life Assurance, Pensions, Mortgages, Investments and be able to discuss with people.	1) Search Irish Independent online website for relevant articles. 2) Read financial companies product details e.g Irish Life, New Ireland, for product Information 3) Compare products and decide on what products might be best for client. 4) Check internet financial comparison websites and come to decision about best products from a cost perspective.				
Previous Admin Jobs	7.	Be able to discuss the previous Admin jobs which you have worked in.	1) Refer to past Admin jobs in CV and be able to give summary of main duties and responsibilities of role.				
Interview Preparation	8.	Prepare Questions and Answers which I might be asked at interview and rehearse in front of camera.	1) Check Job websites for tips and questions to ask. 2) Complete Questions and Answers 3) Rehearse delivery of questions using Camcorder.				
Computer Skills	9.	Become proficient in using MS Office to an intermediate level.	1) <a href="#">Microsoft Office 2010 Certification</a> from eCollege – free to unemployed.				
		Become proficient in using a CMS like Wordpress or G Suite for business so that you can produce basic websites for Online Office Procedures or update the company website.	1) <a href="#">Wordpress Essentials for Business Course</a> on Udemy – Fee E20 2) <a href="#">G Suite for Business</a>				
General Admin Skills		Writing emails and letters to Clients and produce reports where required.	1) <a href="#">Skills You Need</a> website				
	10.	Communicate effectively with Clients, build strong relationships and provide a high level of Customer	1) <a href="#">Diploma in Customer Service</a> from Alison – Free but payment required for certification.				

		Service.	2) Practice different Customer Service Interactions using Microphone and Recording Software				
	11.	Operate office machines such as binders, copiers and scanners	Attend demonstrations of this equipment with Bizquip or other office supplier. May not be essential as equipment easy to use.				
	12.	Deal with incoming and outgoing mail and distribute to relevant parties.	On the job training and becoming familiar with where staff are located in office.				
Networking Skills	13.	Become better at handling working in an office environment e.g building network of supportive colleagues, dealing with internal politics, disclosure of career plans to colleagues, expression of opinions on company or management.	1) Read <a href="#">The Rules of Work: A Definitive Code for Personal Success</a> by Richard Templar.				
Personal Skills	14.	Develop good communication skills.	1) Read <a href="#">Conversationally Speaking</a> by Alan Garner Book				
Languages	15.	Become proficient in Speaking French as some Customer Service Agent Positions require it.	1. Study Hugos French Course - It would increase your chances of finding Admin work as there are quite a few jobs looking for French Language				