



## EUROPEAN BACHELOR'S IN BANKING & INSURANCE - LEVEL 6 EQF



**Level**  
6 EQF (*European Qualifications Framework*)



**Duration**  
1 year



**Credits**  
60 ECTS



**Target group**  
Students - people seeking employment - employees and professionals in the sector



**Admission requirements**  
Candidates holding a level 5 EQF qualification or a qualification equivalent to the attainment of 120 ECTS



**Course Structure**  
Full-time or work-study



**Pedagogical methods**  
Theoretical courses, tutorials and practical work  
Case studies and professional scenarios  
Individual and group projects



**Professional assessments :**

- Continuous assessment
- Case Study No. 1 (3h)
- Case Study No. 2 (4h)
- Activity report and professional support (30 min)

**CCE :**

- Quizzes (1h20)

**Modern language :**

- Reading Comprehension (1h)
- Listening (45min)

**The FEDE, as a certifier, is in charge of the assessment processes**

- Organisation and planning of exam sessions
- Development of topics and model answers
- Ensuring compliance with examination regulations and supervision (anonymity, integrity, confidentiality)
- Assessment and marking of papers
- Reporting results, issuing diplomas, diploma supplements and certificates

[www.fede.education/en/fede-quality-charter](http://www.fede.education/en/fede-quality-charter)

**B**anking and insurance customer advisers work in a sector that is undergoing radical change as a result of digitalisation, the increasing autonomy of customers and the rise of online banking. Their role is to develop their bank's commercial activity by offering personalised banking or insurance products, while managing and developing a customer portfolio.

**The European Bachelor's in Banking and Insurance** trains experts capable of meeting the expectations of a demanding clientele, by developing technical, commercial and interpersonal skills. They play a key role in the local and national economy, boosting employment and increasing the profitability of financial institutions.

### LEARNING OUTCOMES

- Propose solutions to meet the needs of individual and business customers according to their financial situation
- Develop and manage a customer portfolio
- Analyse the market, competition and opportunities
- Contribute to the development of the establishment's commercial strategy
- Acquire the economic and legal skills needed to sell financial products
- Analyse customers' needs and how they evolve in order to propose appropriate banking and insurance offers
- Provide advice on savings and financing, in compliance with the procedures and constraints of a financial institution
- Provide ethical advice to boost customer satisfaction and loyalty
- Be agile by using digital tools to boost performance

### PROGRAMME

#### PROFESSIONAL SKILLS (370-440 HOURS)

- Customer Relations in an Omnichannel Environment**  
Banking environment and customer relations - Stages in the customer relationship - Customer development
- Business Development And Risk Management**  
Competitive intelligence and sales strategy - Prospecting the market and developing the customer portfolio - Responding to the needs of professional customers - Commitments and financing solutions for private individuals - Wealth management advice - Studying customer files and simulations - Monitoring activity and sales reporting - Conducting sales negotiations.
- Customer Portfolio And Risk Prevention**  
Risk prevention policy - Customer risk profile - Standards and regulations - Cybersecurity - Monitoring the banking market
- Professional assignment (≥12 weeks)**  
Internship - Apprenticeship - Salaried employment
- MODERN LANGUAGE (60-80 HOURS)**  
Modern language 1 - CEFR Level B1  
German, English, Spanish, French, Italian, Portuguese  
Modern language 2 and 3 (optional)  
German, English, Arabic, Chinese, Spanish, French, Italian, Portuguese

### CAREER DESTINATIONS

- Insurance Account Manager - Customer Manager - Account Manager - Customer Relations Manager
- Banking Advisor - Customer Advisor - Insurance Advisor - Financial Advisor - Life Insurance Advisor
- Credit Manager - Individual Client Manager
- Banking Operations Agent
- Wealth Advisor - Manager of a high-end client portfolio in a brokerage firm

### FEDE'S ASSET - EUROPEAN DEGREE

#### EUROPEAN CULTURE AND CITIZENSHIP (40H)

##### The European project: Culture and Democracy for Active Citizenship

- Importance of History (OHTe - Observatory on History Teaching in Europe)
- Contemporary Europe
- Europe and the World
- Cultures and diversity in Europe
- European citizenship
- The Workings of the European Union
- Importance, challenges and future of European construction
- Focus on corruption (GRECO)

##### Intercultural management and human resources

- Culture and cultural diversity
- Intercultural communication in an organisation
- Managing intercultural aspects and resolving cultural conflicts
- Working in Europe
- Social protection systems in Europe
- Corporate Social Responsibility (CSR)