

# Mortgage underwriting online course

1<sup>st</sup> & 2<sup>nd</sup> November 2021 (09.30 – 13.00 both days)

In recent years the recognised career path to mortgage underwriter has changed substantially, partly due to the changing nature of mortgage advice. This new virtual course is delivered over two-days and has been designed to equip underwriters with the knowledge required to carry out their role effectively.

## COURSE CONTENT:

- Develop the judgment needed to make sound lending decisions, manage risk and identity fraud.
- Understand and assess customers' needs and circumstances.
- Know how to assess and mitigate the risk features of a given set of circumstances.
- Understand the role of credit reference agency reports and to be able to interpret them.
- Know how to identify unusual application attributes that may lead to mortgage fraud

## DELIVERY:

The course will be delivered using the Zoom virtual platform and will be interactive with several group discussions and case studies for attendees to consider, discuss and apply the knowledge and skills gained from the course.

## DESIGNED FOR:

Trainee underwriters, mortgage advisers that wish to broaden their skillset and those employed in a product development or risk capacity.

*Due to the costs of hiring external expertise, this course will only go ahead if we receive confirmed registrations from 6 attendees.*

## £595

VAT EXEMPT  
BSA MEMBERS  
& ASSOCIATES

*Payment to be made by  
credit card only.*

*Places can be cancelled without  
charge up until Monday, 18<sup>th</sup>  
October 2021. No refunds can  
be given after that date but  
substitutions can be made free  
of charge at any time.*

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ONLINE

[www.bsa.org.uk/  
underwriting](http://www.bsa.org.uk/underwriting)



Chartered  
Insurance  
Institute

## TRAINER

### Ian Bruce



Ian started working as a self-employed consultant eleven years ago, bringing with him a range of experience as a salesman, sales manager, trainer, training manager, management developer and coach with experience at senior management level both in the UK and internationally. He worked for NatWest and Coutts & Co for 23 years.

*Ian has a unique mix of skills in that he is equally capable of delivering interactive courses on both soft skills and technical subjects. He has a track record as a successful practitioner in the following areas: Sales, Customer Service, Wealth Management and Private Banking,*

*Communication Skills, Negotiating, Coaching, Management Development, Managing Performance, Change Management, Call Centres, Banking, Financial Services and Mortgages.*

*Ian is noted for his infectious energy and enthusiasm. He delivers fun and interactive training sessions and possesses a keen sense of humour. He also feels it is important to be a successful practitioner in all the areas in which he provides training and coaching. His career history enables him to share his experiences from the workplace, which delegates feel demonstrates the value of any tools, techniques or theoretical knowledge included within his training programmes.*

*Ian has an extensive list of qualifications and is qualified to Degree Level in Banking and Financial Services and Diploma Level in Learning and Development. He has achieved the following Professional Memberships by examination:*

- Fellow of the British Institute for Learning and Development
- Fellow of the Personal Finance Society
- Fellow of the Institute of Financial Services
- Member of the Society of Mortgage Professionals
- Member of the Chartered Institute for Securities and Investment
- He is also qualified at Level 4 in Mortgages

***“Ian was an excellent trainer and made the training fun, which is a better way to learn.”***

***“A really good interactive course, with lots of time to share experiences with other Societies.”***

***“Very positive across both days - Ian was great, the other participants were positive and open, and I learned a lot about the broader approach to underwriting mortgages.”***

*Delegate feedback from our July 2021 online course*

*We have designed this course in partnership with the Chartered Insurance Institute (CII), the leading professional body for the global financial services profession*



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