



Chartered
Insurance
Institute

CII Mortgage
Assess

Elevate performance

Learning powered by professional expertise.

www.cii.co.uk/assess



Take your organisation's training and development to the next level

MortgageAssess is a powerful LMS, built by mortgage experts to support learning, compliance and continuous professional development. Using video, interactive scenarios and case-based learning, the platform tracks progress and inspires users to stay motivated and engaged.

MortgageAssess content is divided into intuitive catalogues on key aspects of the profession. Catalogues include Mortgage and Home Finance, Governance, Risk and Compliance, Health and Protection and more.

Get in touch to register for a 14-day free trial, attend an online demo or request a Content Guide at www.cii.co.uk/assess



Courses

For onboarding new staff, branch staff, underwriters and qualified advisers. There are training courses covering everything from buying a house, the legal process, mortgage products, giving advice and regulatory requirements.

Content

With almost 700 courses and 3,500 assessment questions, MortgageAssess covers the basic principles of Financial Services and regulation up to the more technical details of Mortgages and Home Finance. Content is divided into a range of intuitive catalogues, each of which focuses on a key aspect of the profession.

Analytics

Analytics reports are delivered direct to your desktop, tablet or mobile to support training and competency requirements. MortgageAssess automatically records activity to help you build reports and evidence training and competency activities across your business.

Regulation and Compliance

Get the right training your organisation needs to keep up with regulations and compliance, including specific FCA Core CPD content.

Diagnostics and Testing

Diagnostics, gap analysis and assessments help you with your training, competency and compliance requirements.

Learning Management System (LMS)

Complete control over training and development, with features to help you manage training, schedule activities and monitor staff development.

Courses

MortgageAssess has over 600 courses for your business, topics include; buying a house, the legal process, mortgage products, giving advice and regulatory requirements. Courses are continually updated throughout the year at no extra cost.

Onboarding

Both the Mortgage and Home Finance and Governance, Risk and Compliance catalogues are perfect for offering a broad understanding of the mortgage sector and the regulatory requirements staff must adhere to.

Courses for Qualified Advisers

Designed for qualified advisers, we have an extensive catalogue of courses that cover everything from the fundamentals of buying a house to the legal process, mortgage products, giving advice and regulatory requirements.

Making it Personal

Create and build your own e-learning courses with the inbuilt authoring tool, or top and tail MortgageAssess courses so they're personalised for your business.

Business Skills

Help your staff build business skills and knowledge with a wide range of short courses from Project Management to Personal Development, HR and Health and Safety.

Courses

Use pre-built learning courses or create your own tailored to your business needs to build knowledge and understanding across individuals and teams.

Continuing Professional Development (CPD)

The inbuilt CPD tool automatically records completed activities on the system and allows users to record their non-MortgageAssess CPD activities too – so all records are in one place.

MortgageAssess Case Studies

A selection of case studies aimed at mortgage advisers, focusing on the key points and challenges facing customers during their mortgage journey. With an emphasis on learner interaction, this content puts learning in the context of real-world situations and scenarios.



Regulation and Compliance

MortgageAssess courses are aimed at all levels in your business, right up to the board.

With over 350 courses and videos on regulatory and compliance topics available to choose from, you can be assured MortgageAssess has it covered.

Staying fresh with regulation has never been more critical. From FCA Core CPD to the Senior Managers & Certification Regime, MortgageAssess builds and checks knowledge across your organisation to stay ahead of regulatory demands.

EU Mortgage Credit Directive (MCD)

The Mortgage Credit Directive outlines the EU conduct rules that apply to mortgage firms and applies equally to first and second charge mortgages. Our Mortgage and Home Finance catalogue helps you understand and meet these requirements.

Financial Crime

Our Anti-Money Laundering and Countering Terrorist Financing for Financial Service, Fighting Fraud for Governance, Risk and Compliance, Bribery and Corruption for Governance, Risk and Compliance courses, and our Data Protection and GDPR courses address the more common areas of regulation.

Conduct

Courses on Conduct Rules, Conflicts of Interest, Due Diligence and Whistleblowing help maintain professional standards across your business.

FCA Core CPD (IDD)

The FCA requires organisations that are distributing insurance products, or are involved in their distribution, to complete sufficient CPD to maintain appropriate levels of knowledge and competence. Firms are responsible for ensuring that their employees continue to maintain these levels.

Our FCA Core CPD catalogues in MortgageAssess include content appropriate for many employees to support this. The content in these catalogues can be easily supplemented with our other technical content from the hundreds of courses available. All activity completed on MortgageAssess is automatically captured as CPD.

AI, GDPR and Sustainability

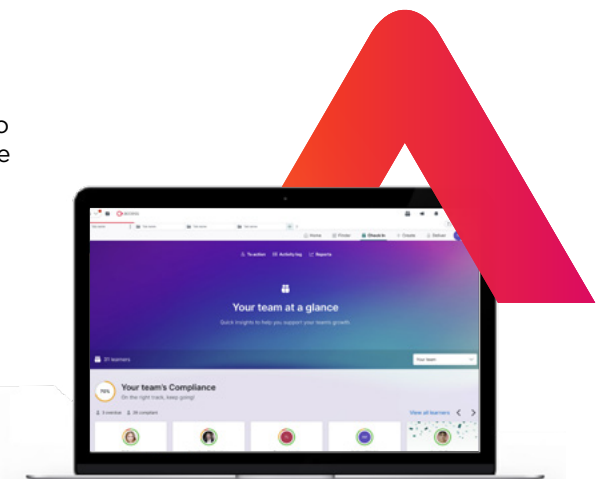
We're constantly adding to and updating our content to keep you ahead of the curve in these critical topics.

Managing the Customer

Courses on Understanding Vulnerable Customers, Customer Experience, Complaint Handling, Conduct Risk and Treating Customers Fairly build the skills and competencies to help maintain professional standards across your business.

Non-Financial Misconduct (NFM)

MortgageAssess has many courses that cover all aspects of NFM.



Diagnostics and Testing

Diagnostics, gap analysis and assessments – with over 1,000 questions, help meet all your mortgage and compliance requirements.

Managing Risk Within Your Business

The integrated diagnostic tool enables you to understand knowledge levels across your business in real time. Using a diagnostic approach lets you test on a broad set of knowledge areas, giving you critical insight into where learning needs to be focused. This approach ensures that staff only need to complete learning where they need to, which in turn, saves you time.

Gap Analysis

The diagnostic tool measures a user's knowledge against required competencies for their role. Learning courses are then automatically created for each user to help you manage and maintain knowledge across a wide area.

Micro Assessments

To help staff maintain regulatory and technical training each year, the diagnostic functionality supports micro assessments so you can explore multiple competency areas in one sitting.

Standard Assessments

For standard assessments, simply choose the course, the number of questions and the pass mark, for an assessment to be randomly created from an up-to-date question bank.

Analytics

Good quality reporting drives performance and success. Training activities are automatically recorded to build data reports so you can easily evidence training and competencies across your business.

Flexible Reporting

You can build your own reports or select from a range of pre-built reports. View courses in progress, course completions, assessments, test scores and results.

Dashboards

Detailed dashboards bring your training data to life, providing you with a clear view of user activities, completions and scores across teams and departments.

Robo Reporting

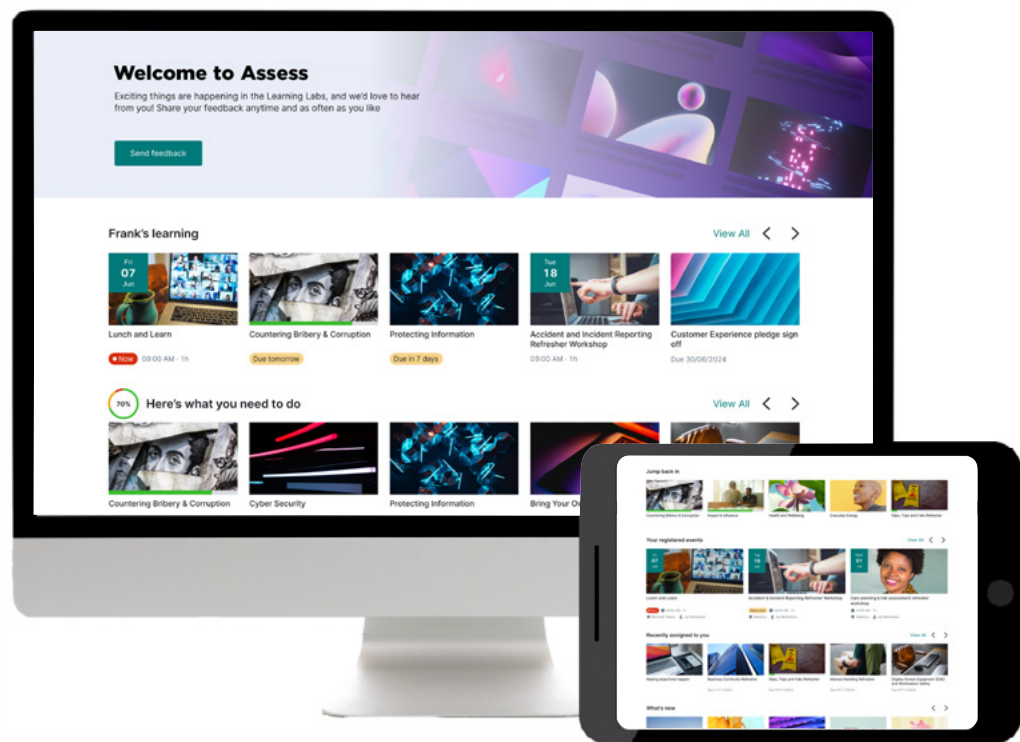
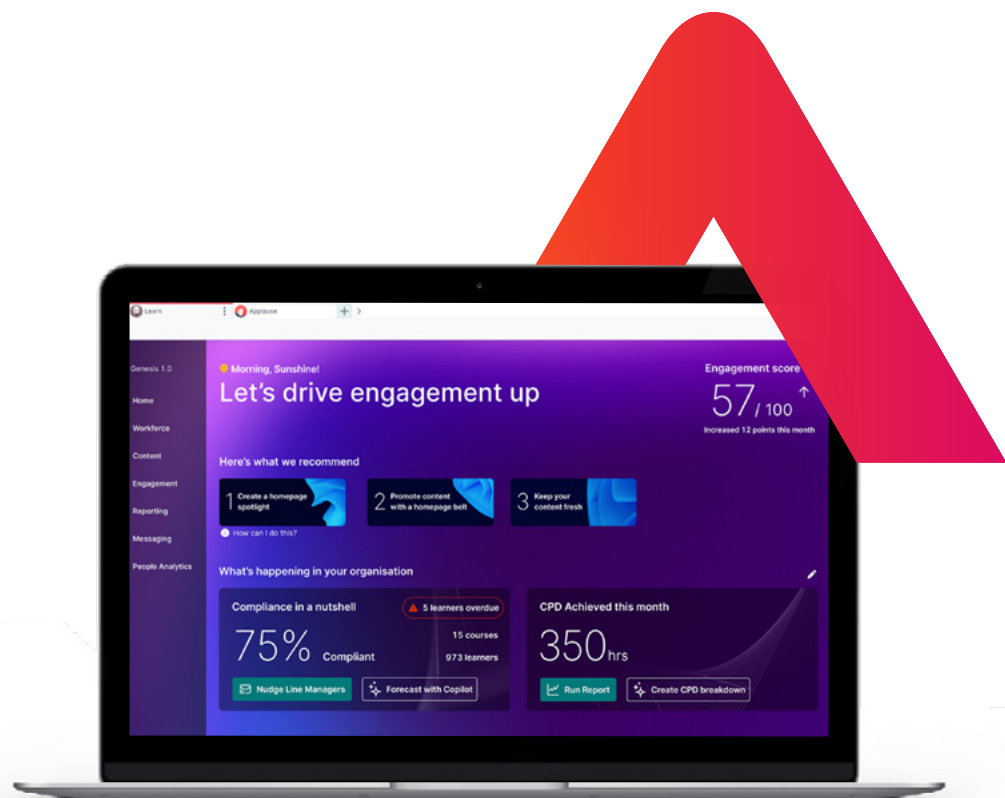
You can set up the automatic delivery of reports so they arrive when you need them.

CPD Reports

Users can complete development needs and reflective statements online. MortgageAssess automatically records each activity to help maintain CPD records and run reports. Users can also add offline CPD events to MortgageAssess and CII members can link their MortgageAssess record to their CII CPD record and maintain their activity in one place.

The Manager's View

Managers have access to their direct reports' progress on all allocated MortgageAssess activities by viewing the manager's dashboard from their homepage. This is a key way to ensure learning courses are completed.



Content

MortgageAssess helps raise professional capability with intuitive learning catalogues focused on the key disciplines of the profession. Discover the specialist areas covered.

Mortgage and Home Finance

Created for all staff, this catalogue helps you satisfy the EU Mortgage Credit Directive (MCD) requirements. Understand the parties and methods involved in buying, selling and financing property, as well as the regulation, mortgage advice and the criteria to fulfil and the various types of mortgage. In addition, topics such as selecting suitable insurance to combine with a mortgage, plus commercial mortgages, equity release and arrears and possessions are also covered.

MortgageAssess for Qualified Advisers

This catalogue is for those who are already in mortgage advisory positions helping to keep knowledge current. The catalogue has courses on The Residential Property and Economic Environment, The Home Buying and Finance Raising Process, Mortgage Products, Buildings and Contents Insurance, Personal Insurance, Post-Completion Issues, Advice and Sales Process, and Regulation.

Monthly Market Update

Receive the latest market changes in regulation and news impacting the mortgage sector and record up to 1 hour of CPD. Administrators can allocate this to individuals each month.

Governance, Risk and Compliance for Financial Services

This catalogue is designed to help your business develop a compliant culture and face governance, risk and compliance challenges with confidence. Topics include Financial Crime, Conduct, Data Security, SM&CR, Key-Point Videos and Fundamentals.

Fundamentals includes AI and sustainability, AI and Data Protection, Green Finance and ESG, Maintaining Information and Cyber Security, Managing Regulatory Reviews and Audits for Financial Service, Freedom of Information for Financial Service and Modern Slavery for Financial Service.

FCA Core CPD

MortgageAssess houses pre-built courses aimed at all staff distributing insurance products, or are involved in their distribution. These help demonstrate minimum levels of knowledge in specific core areas highlighted by the regulator. In addition, there are over 400 role-specific technical training modules to demonstrate product competency.

Health and Protection

Representing a sizeable sector of the market, this catalogue delivers a broad range of healthcare and protection insurance products such as Life Assurance, Critical Illness, Long-term Care, Private Medical, Income Protection, Health Cash Plans, Dental Plans, Business Protection and more. Most courses review the policy cover, underwriting, claims and broking.

Workplace Skills

These short courses cover Communication and Social Skills, Leadership and Management, Personal Development, Teamwork and Customer Experience.

CII Qualifications Revision

As a bonus, we have included our E-Learn revision content for R01, CF1 and CF6.

Mental Health and Wellbeing

Over 40 courses covering topics from Mental Health Awareness, Building Resilience, Wellbeing, Managing Emotions and Better Decision Making.

Health and Safety

Over 90 courses for all businesses to maintain compliance with the law and to protect the workforce.

MortgageAssess Case Studies

A selection of case studies aimed at mortgage advisers, focusing on the key points and challenges facing customers during their mortgage journey. With an emphasis on learner interaction, this content puts learning in the context of real-world situations and scenarios.



Learning Management System (LMS)

MortgageAssess gives your organisation access to your own LMS. The powerful platform is packed with features to help you allocate, manage, record and report on all learning completed on the system. You can also record CPD, schedule activities and monitor staff activity.

Easy Online Access

MortgageAssess is an online training and competency solution which means it is easy to access 24/7. Everyone with a licence can log into the system via a PC, tablet and mobile phone. There is no installation required, just login to start training – it's that easy.

Customisation and Personalisation

You can customise the standard MortgageAssess site to include your own company logo or create a bespoke site for your business.

Easy Admin

MortgageAssess is automated to simplify admin. Our customer service team can help you create rules so your training and reporting can be repeated on a regular basis.

Manager Controls

Managers can easily monitor training activity across their teams and view staff progression on the 'manager view' dashboard. With managers involved in the training management process you can maximise all the benefits of MortgageAssess for your business.

Set Up

No matter the size of your company, we can replicate the hierarchy. If you have different departments, locations, or teams, it is easy to replicate that structure on MortgageAssess.

You can create specific learning courses and allocate to different groups to suit their learning and development needs. You can report on an individual's progress or look at specific departments or teams to see if there are any learning areas that need to be addressed.

e-Creator

The inbuilt authoring tool allows you to build e-learning activities and training to suit your requirements.

Developed by leading professionals, MortgageAssess is a powerful LMS delivering expert-led learning content to encourage compliance and continuous professional development throughout your organisation.

For more information on how MortgageAssess can benefit your business, contact business.enquiries@cii.co.uk

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