

1. TITLE OF THE CERTIFICATE (ES)

**Certificado de Profesionalidad de nivel 3 en
ADGN0210 MEDIACIÓN DE SEGUROS Y REASEGUROS PRIVADOS Y ACTIVIDADES AUXILIARES**

2. TRANSLATED TITLE OF THE CERTIFICATE (EN)

**Professional Certificate Level 3 in
ADGN0210 PRIVATE INSURANCE AND REINSURANCE BROKERAGE AND AUXILIARY ACTIVITIES
(This translation has no legal status)**

3. PROFILE OF SKILLS AND COMPETENCES

The holder of this certificate will have acquired the **general competence** to manage brokerage activities with insurance or reinsurance policyholders, proposing and carrying out the work prior to signing the insurance or reinsurance contract or during its execution, as well as assisting in the performance of the contracts, in particular in the case of claims, with transparency and quality of customer service, ensuring customer rights are observed, and in accordance with the internal procedures and current law; and to coordinate and supervise the work team. This general competence is divided into the following **skills units** (UC):

- Plan and manage insurance and reinsurance brokerage activity (UC1793_3).
- Organise and manage sales in brokerage activities (UC1794_3).
- Carry out actions to attract customers in brokerage activities (UC1795_2).
- Advise and assist customers technically in buying insurance and reinsurance (UC1796_3).
- Manage the procedures involved in executing and performing insurance and reinsurance contracts (UC1797_2).
- Assist customers and liaise with insurance institutions in processing claims (UC1798_3).
- Manage and supervise the network of external insurance and reinsurance brokerage auxiliaries (UC1799_3).
- Respond to and process suggestions, consultations regarding transparency and protection, complaints and claims by customers in financial services (UC0991_3).
- Handle computer applications for managing information and documentation (UC0233_2).

The professional skills are acquired through the **learning outcomes** defined within the related Training Modules (MF):

- Management of insurance brokerage activities (MF1793_3).
- Management of sales in brokerage activity (MF1794_3).
- Management of customer attraction in insurance and reinsurance brokerage activity (MF1795_2).
- Advice on insurance and reinsurance products and services (MF1796_3).
- Processing of the execution and performance of insurance and reinsurance (MF1797_2).
- Technical assistance in claims (MF1798_3).
- Direction and management of external auxiliaries (MF1799_3).
- Responding to and processing suggestions, consultations, complaints and claims by customers of financial services (MF0991_3).
- Computing (MF0233_2).
- Practical training at the workplace in private insurance and reinsurance brokerage and auxiliary activities (MP0387)

(See legal basis for all learning outcomes information acquired by the holder of this Certificate in each MF).

As a reference the learning outcomes include in the Practical training at the workplace that complete and reinforce the learning outcomes acquired in the other training modules, are:

- Plan, organise and manage insurance and reinsurance brokerage activity, identifying the sales communication and promotion actions established by the company.
- Carry out actions to attract customers in brokerage activities, advising and assisting customers technically to acquire insurance and reinsurance.
- Manage the processes of executing and performing the insurance and reinsurance contract, verifying the project and application for insurance, the documents needed for formalisation, guarantees contracted, tax treatment, objects to insure and completing the details by computer to obtain the correct tariff.
- Take part in the company's working processes, following the rules and instructions established at the workplace.

4. RANGE OF OCCUPATIONS ACCESSIBLE TO THE HOLDER OF THIS CERTIFICATE

The holder of this certificate may work in the financial insurance sector, and bancassurance operators.

The most pertinent occupations and positions are:

- Insurance agent.
- Exclusive insurance agent.
- Linked insurance agent.
- Insurance broker.
- Reinsurance broker.
- Insurance specialist.
- Employee of insurance and reinsurance brokers with functions to advise and assist customers.
- Insurance administration clerk.
- Insurance broker employee with commercial and administrative functions.
- External insurance and reinsurance broker assistant.
- Assistant insurance broker adviser.
- Directors of responsible brokerage institutions.
- Technical director of exclusive and linked insurance agencies, exclusive and linked bank-assurance operators and insurance and reinsurance brokers.
- Employee of the distribution network of bank-assurance operators.

The requirements for participation in any brokerage activity in private insurance and reinsurance are laid down by the Directorate-General for Insurance and Pension Funds, in accordance with Law 26/2006 of 17 July. The training program in this Certificate corresponds to the learning program in the Resolution of 18 of February 2011, from Directorate-General for Insurance and Pension Funds (Official Gazette 5 of March 2011).

5. OFFICIAL BASIS OF THE CERTIFICATE

Name and status of the national/regional authority providing accreditation/recognition of the certificate

The Ministry of Employment and Social Security or the corresponding autonomous regional administration within the scope of its competence, in the name of the King. The certificate is valid throughout Spain.

Level of the certificate

The Professional Certificate Level 3 of the National Repertoire of Professional Certificates corresponds to level 4 of the International Standard Classification of Education (ISCED-P 2011).

The European Qualification Framework (EQF) level:

Grading scale/Pass requirements

The grading scale and pass level of the training modules are expressed on a scale of 0 to 10. The minimum score for a pass is 5 in every training module including a pass in the practical training at the workplace module.

The grading system is as follows:

- FAIL: 0 to 4.9
- PASS-SATISFACTORY: 5 to 6.9
- PASS-GOOD: 7 to 8.9
- PASS-EXCELLENT: 9 to 10

Access to next level of education/training

This Professional Certificate Level 3 gives access to Professional Certificate Level 3 within the same professional area and family.

For validation purposes, the educational authorities will recognise the professional module or modules of the VET diplomas corresponding to the skills units included in the training modules of this certificate.

Legal basis

Royal Decree 610/2013 of 2 August, establishing two professional certificates in the professional family Administration and Management, which are included in the National Repertoire of Professional Certificates. (Appendix II, Code: ADGN0210).

6. OFFICIALLY RECOGNISED WAYS OF ACQUIRING THE CERTIFICATE

This certificate may be acquired by:

1. Training: Completion with a pass grade of the face-to-face or online training programme.
2. Recognition of the professional skills acquired through professional experience or non-formal training (prior learning): Completion of a process of skills evaluation and accreditation in all the skills units making up the professional certificate.
3. Dual training: Completion of a training and apprenticeship contract, which may range from 1 year (or 6 months, if stipulated as such in the collective agreement) to 3 years, during which effective working time is combined with time dedicated to training under the training programme for the professional certificate.

The training method (number 1 above) requires successful completion of the training modules and the practical training at the workplace:

Description of vocational training received	Percentage of total programme (%)	Duration (hours)
Training modules	95	690
Practical training at the workplace	5	40
Total duration of training leading to the certificate		730

Entry/access requirements:

- *Bachiller* Diploma (upper secondary education); or
- Professional Certificate Level 2 in the same professional area.
- If neither of the above or higher certifications are held, a pass in the key skills tests.

Additional information: Professional certificates are instruments for official accreditation of the professional qualifications in the National Catalogue of Professional Qualifications for all economic activities, within the scope of the labour administration. The National Repertoire of Professional Certificates is divided into three qualification levels (Level 1, Level 2 and Level 3), and by sectors into 26 professional families and 102 professional areas. More information is available at: www.sepe.es

National Europass Centre: www.oapee.es

(*) **Explanatory note:** This document is designed to provide additional information about the specified certificate, but has no legal status in itself. The format of the description is based on the following texts: Council Resolution 93/C 49/01 of 3 December 1992 on the transparency of qualifications; Council Resolution 96/C 224/04 of 15 July 1996 on the transparency of vocational training certificates; and Recommendation 2001/613/EC of the European Parliament and of the Council of 10 July 2001 on mobility within the Community for students, persons undergoing training, volunteers, teachers and trainers.

More information is available at: <http://europass.cedefop.eu.int>

Information on Professional Certificates of the Map of Qualifications and Vocational Training in Spain

