

A2A Qualifications

Turning Aspiration to Achievement

Ofqual regulated awarding organisation

Your End Point Assessment

What to expect, step by step

Financial Adviser • Level 4 • ST0374

Check your dates and the correct version of the assessment plan with your training provider.

Getting ready – on the day of your EPA

A short checklist to set you up for success



Log in around 15 minutes early

Please check your connection. Allow extra time for set up, breaks and contingency.



Have your photographic ID

Be ready to show it on camera at the start.



Test your tech

Check Wi-Fi, microphone and camera in advance. Screen sharing required for the Case Study Test.



Choose a suitable quiet location

EPA can be completed from work, home, or your training provider, under exam conditions.



Have your portfolio with you

You should bring the portfolio to the Viva. Notes are also permitted.



Recording is standard

All EPA elements are recorded for quality and training purposes.

What is the End Point Assessment?

The final stage of your apprenticeship

EPA is how an independent assessor confirms that you are competent in the role of Financial Adviser. It forms 100% of your apprenticeship grade.

Your EPA is made up of two assessment methods. You must pass both.



1. Case Study Test

30% weighting

- Held online under exam/test conditions set by the assessment organisation.
- Typically lasts around 90 minutes (including 15–20 mins recommended for reading).
- You'll analyse a part-completed client case file and answer written questions online.
- Screen sharing required. Tests a minimum of 15 learning outcomes.



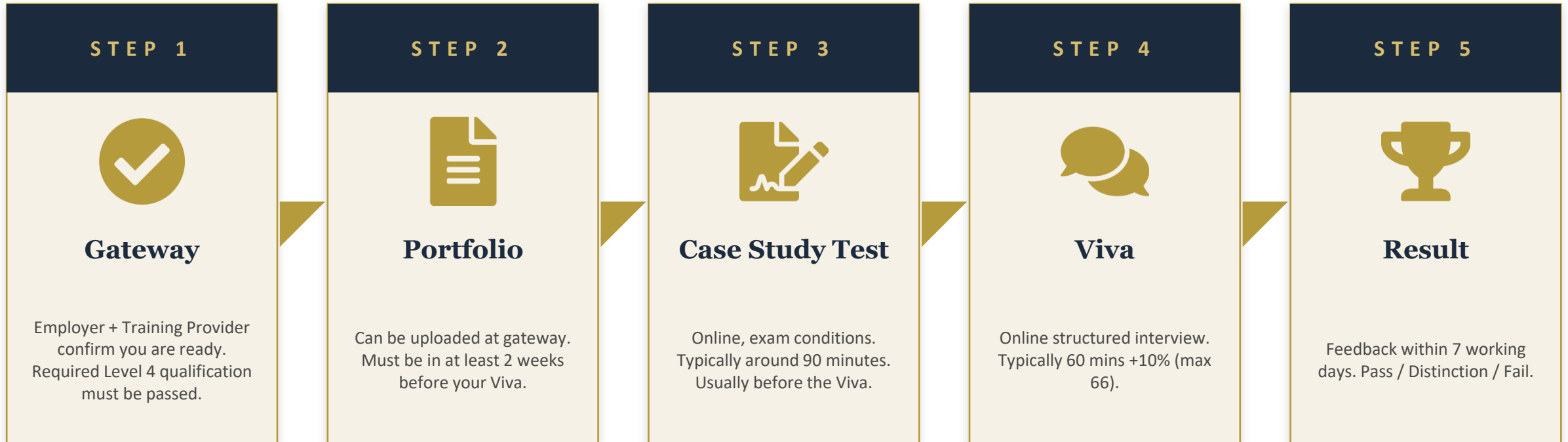
2. Viva + Portfolio of Evidence

70% weighting

- Portfolio: a range of evidence (typically around 20 items) showing your knowledge, skills and behaviours.
- Viva: a structured interview, typically 60 minutes plus 10% (max 66 minutes).
- Notes and your portfolio are permitted.

Your EPA journey — step by step

Specific dates and links will be confirmed by email



All dates, meeting links and assessor contact details are sent to you by email.

How you will be graded

Results released within 7 working days of submission

PASS



You meet the standard

Minimum 65% in BOTH the Case Study Test (30%) and the Viva (70%). All mandatory learning outcomes must be evidenced.

DISTINCTION



You exceed the standard

A Distinction in the Viva (min 80%) with at least a Pass in the Case Study Test. The Viva carries the higher weighting (70%).

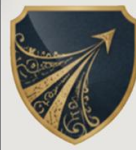
FAIL



Re-sit available

If either method falls below the pass threshold, your Training Provider and employer will agree a re-sit plan. A formal appeals process is also available.

Please note: if you are late or do not attend your EPA, your provider/employer may be charged a fee.



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In the first instance please ask questions to your training provider.



Call us

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Email us

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