

## Level #3 – Get Qualified in SEPM or CP

### Application process and conditions

*Personalized and individual coaching to reach the highest standards of assessment skills!*

Level #3 is a personalized and individualized coaching program provided by Cerise+SPTF for individuals interested in becoming **qualified auditors**.

Being a qualified auditor also means you join **the SEPM Professionals Network**, a community of experts run by Cerise+SPTF, who support financial service providers in their SEPM and client protection agenda and strategy.

As a qualified consultant and “SEPM Pro”, stakeholders such as investors or FSPs may contact you to conduct accompanied assessments, third-party validations, support a journey towards a Certification, or conduct trainings.

Access to the qualification program is subject to a **selection process** in which the candidate’s profile and work prospects for conducting audits will be assessed.



#### Target audience

The “#3- Get qualified” program is exclusively reserved for:

- ◇ **Consultants** who are available to conduct third-party assessments and support financial institutions directly in the field
- ◇ Impact **investment or fund managers** who are in charge of integrating SEPM or CP in the selection and monitoring of their investees
- ◇ Managers of **national, regional and international networks** who support their members in conducting SPI or CP audits and improving practices
- ◇ Employees and external committee members of **rating agencies** or **technical assistance organizations**.

Cerise+SPTF qualifies a maximum of 2 individuals per organization, and doesn’t qualify FSP employees.



#### Process to apply

Candidates interested in following this program will need to have validated the “#2 – Go deeper” course in the same learning path (eg: validate Level #2 in CP to then apply for #3 -Get qualified in CP) and to submit an application to Cerise+SPTF Qualification steering committee: [training@spi-online.org](mailto:training@spi-online.org)

The application should include the following information:

- » Your Training Certificate for #2 - Go deeper in the same learning path
- » An application letter expressing your interest in this program, your experience in the financial inclusion sector and/or in SEPM or CP assessments, how you expect to use this qualification, and the prospect FSP you have identified to complete the actual assessment, with date estimates
- » A resume or CV, including the languages you can work in, where you are based and what are your geographical areas of intervention



Please note that the “#3 – Get Qualified” program **involves a real and in-the-field case of SPI audit or CP assessment**. You should thus have already identified a client / beneficiary before you apply, and have an estimate of when the on-site visit could take place. You should also formally secure your mission (signed contract) before you start the program.



### Your benefits and duties

As a qualified auditor, you will join the “SEPM Pro” pool of experts led by Cerise+SPTF, hence you will benefit from exclusive resources, visibility on our [website](#), and a privileged access to consultancy work.

In return, SEPM Pros are expected to be actively involved with the network and to conduct regular CP or SEPM activities; your duties include, but are not limited to, attending webinars and training sessions, keeping up to date through the newsletters, updating your knowledge with resources provided by Cerise+SPTF, answering Cerise+SPTF annual surveys, etc...

***If you haven't yet discovered our #1 and #2 courses on SEPM and CP, register now on our e-learning platform!***

#### What if I work for a Financial Service Provider?

#### What if I'm not selected for the Qualification program?

- ❗ If you have successfully completed Level #2 in either Client Protection or SEPM, you already have the necessary skills and knowledge, and are fully equipped to conduct rigorous and quality audits and action plans
- ❗ Remember that **SPI Online is a free and public tool** that everyone can use!

#### What if I'm already SEPM qualified and want to become CP-qualified or vice-versa?

- ❗ Each qualification program is distinct, and you should go through the whole learning path (#1 and #2 and #3) to get your second qualification. Please note we offer a 40% discount on #3 to those who are already qualified.