Academy.AI.Loan IQ – FAQs

1   What is the Academy.AI.Loan IQ?

The Academy.AI.Loan IQ is a learning platform that offers contextualized, role-based training, with the aim of supporting the enablement and continuous development of Loan IQ skill sets for Finastra, its customers, and its partners.

The platform provides modular, self-paced, online courses and resources to help learners both understand and use Loan IQ – Finastra's market-leading lending software solution – as well as the lending industry more broadly.

The Academy consists of four courses: Foundation, Advanced, Specialist and Implementer. Each module covers different aspects of the Loan IQ system, such as data model, workflows, business rules, reporting, and integration.

2   What are the benefits of being certified through the Academy.AI.Loan IQ?

There is a recognized skills shortage in the lending market, representing a key challenge for the industry, and the Academy aims to address this issue. By providing high-quality training on Loan IQ, covering business, technical and delivery topics, the Academy.AI.Loan IQ can help learners to master the software and its features, and apply it to their business needs and goals.

By completing the training, users can enhance their performance, reduce costs, improve customer satisfaction, and increase employee engagement.

The participants will gain a thorough understanding of the Loan IQ software and its features, therefore enhancing their skills and confidence in using the Loan IQ system.

Graduates of the Academy will obtain a globally-recognized certification in Loan IQ, the Finastra Certified Associate (see question 7) that will boost their career prospects and opportunities in the lending industry.

3   Who can enrol in the Academy.AI.Loan IQ?

The Academy.AI.Loan IQ is recommended to anyone who wants to learn more about the Loan IQ software and how to use it effectively. The Academy is suitable for beginners and experienced users and for different roles, such as business analysts, developers, testers, and support staff.

The Academy.AI.Loan IQ is open to all customers, partners and Finastra employees. You can register and access the Academy.AI.Loan IQ online at ***www.finastra.com/loan-iq-academy-ai*** or by sending an email to **LoanIQ-Academy@finastra.com**.

4 **What are the available courses?**

Foundation Course:

1. **Lending Principles:** This course covers the basic concepts and principles of lending, such as loan types, loan structures, and the loan lifecycle.
2. **Loan IQ Fundamentals:** This course introduces the core features and functionalities of Loan IQ, such as customers, deals, facilities, and products.

Advanced Course:

1. **Advanced Functional:** This course dives deeper into the Lending business topics and operational aspects of Loan IQ, such as servicing, syndication, secondary trading, ARR and risk management.

2. **Advanced Technical:** This course teaches advanced technical topics including Data model, Ticklers, APIs, Queries and Configuration files.

Specialist Course:

1. **Integration/Migration Specialist :** This course provide insights into the tools and strategy used for integration of Loan IQ and Remote Execution.

2. **SDK Specialist:** This course covers APIs, SDK artifacts and tools and deployment procedures.

3. **Reporting Specialist:** This course demonstrates how to use Loan IQ reporting with DataNet and Cognos Studio and information on standard reports.

4. **Accounting Specialist:** This course explains Accounting mapping, Interest and Fee Accruals, Portfolio allocations and P&L topics.

Additional details for each course can be found at *www.finastra.com/loan-iq-academy-ai*

5 **How long does it take to complete each level of the Academy?**

Courses	Duration of course	Certification window after completion of training
Foundation Course: Basic Business Concepts & Loan IQ Fundamentals	4 weeks	2 weeks
Advanced Course: Advanced Business Concepts & Loan IQ Features	6 weeks	2 weeks
Specialist Course: Expert Learning topics	8 weeks	4 weeks

* For pricing information, please send an email to LoanIQ-Academy@finastra.com or contact your sales rep.

6   **How is the Academy.AI.Loan IQ delivered?**

The Academy.AI.Loan IQ is delivered both online through a combination of videos, interactive exercises, and via hands-on practice sessions as well as webinars and guest lectures.

Participants can access the Academy content through the Litmos learning management system, where they can also interact with the instructors and other learners.

7   **What certifications are available?**

Finastra Certified Associate (FCA): A certification for having demonstrated basic to advanced knowledge of Loan IQ and its business concepts. It requires completion of the self-paced training and passing an online exam with at least an 80% score. It has three stages: Foundation, Advanced, and Specialist, and the certification is valid for two years. Should there be a significant update to the product, we will supply additional training resources to help course attendees refresh their certification, free of charge.

Finastra Certified Implementer (FCI): A second-level certification for having demonstrated the ability to implement and deliver Loan IQ. To apply for the FCI certification, one must have earned the FCA certificate within the past two years. The FCI is granted upon the completion and presentation of a case study based on an actual implementation project. The certification is valid for two years.

8   **How is the content structured and when will it be ready?**

All course content is currently available, with the exception of the Implementer Course, which will be launched in the second half of 2025 and will include.

1. **Keystone Methodology:** This course explains how to apply the Loan IQ Keystone methodology, a best practice framework for implementing Loan IQ projects, covering topics such as analysis, design, development, and delivery.

2. **Target Operating Models:** This course describes how to design and implement target operating models for Loan IQ, comprising processes, roles, systems, and data.

3. **Integration:** This course teaches how to integrate Loan IQ with other systems and platforms, both internal and external.

Course Name	Date Available
Foundation Course: Basic Business Concepts and Loan IQ Fundamental	Live
Advanced Course: Advanced Business, Functional and Technical Concepts"	Live
Specialist Courses: Integration / Migration, Reporting, Accounting and Software Development Kit (SDK)	Live
Implementer Course: Delivery Domain	2H of 2025