



ASIC
Australian Securities & Investments Commission

eTraining Register

Advanced Diploma of Financial Services (Financial Planning)

Course details last updated on the register on 18/11/2009

COURSE DETAILS

Course Name	Advanced Diploma of Financial Services (Financial Planning)
Course Information	The Advanced Diploma is comprised of FOUR specialist courses and it is a pre-requisite entry requirement that a student must have successfully completed the the Diploma of Financial Services (Financial Planning) (FNS50804) prior to enrolment. Participants who are assessed against any of the ASIC advisory units and their pre-requisites identified below within this program will receive a Statement of Attainment listing which ASIC units have been completed. Upon successful completion of the Advanced Diploma you will be able to: <ul style="list-style-type: none"> • conduct complex financial planning research • Provide technical and professional guidance • Determine client requirements and expectations for clients with complex needs • Provide comprehensive monitoring and ongoing service • Develop complex and/or innovative financial planning strategies • Present and negotiate complex and/or innovative financial plan to the client • Implement complex and or innovative financial plan • Monitor corporate governance activities. The course is offered as distance, workshop or RPL. The cost and duration indicated below refers to distance education. Please contact provider for details regarding other study methods.
Competencies Covered	A student will only be RG146 compliant for the specialist knowledge areas below if the following units are included on the Statement of Attainment issued in conjunction with the Advanced Diploma qualification. Financial Planning: FNSASIC503ZB, FNSFPLN501B, FNSFPLN502B, FNSFPLN503B, FNSFPLN504B, FNSFPLN505B. Securities: FNSASIC503WB, FNSICCUS506B, FNSICCUS507B, FNSFMKT502B, FNSFMKT503B. Derivatives: FNSASIC503VB, FNSICCUS506B, FNSICCUS507B, FNSFMKT502B, FNSFMKT503B. Managed Investments: FNSASIC503TB, FNSICCUS506B, FNSICADV502B, FNSICPRO502B, FNSICCUS507B. Superannuation: FNSASIC503UB, FNSICCUS506B, FNSICADV502B, FNSICPRO502B, FNSICCUS507B. Life Insurance: FNSASIC503XB, FNSICADV501B, FNSCOMP501B, FNSICPRO502B, FNSICCUS507B.
Award Given at Completion	Advanced Diploma of Financial Services (Financial Planning) + Statement of Attainment
Specialist Knowledge	Financial Planning, Securities, Derivatives, Managed Investments, Superannuation, Life Insurance, Insurance Broking, Generic Knowledge, Skills
Tier	1
Where Course Delivered	Melbourne, VIC regional
Delivery Method	Self-paced, Face-to-face
Assessment Type	Examination - open book, Case study, Class attendance, Other - Role Plays

Start Date 1/6/2004
Re-registration Date 1/12/2008
Duration/Total Hours 260
Approximate Cost \$1,800.00
Pre95 No

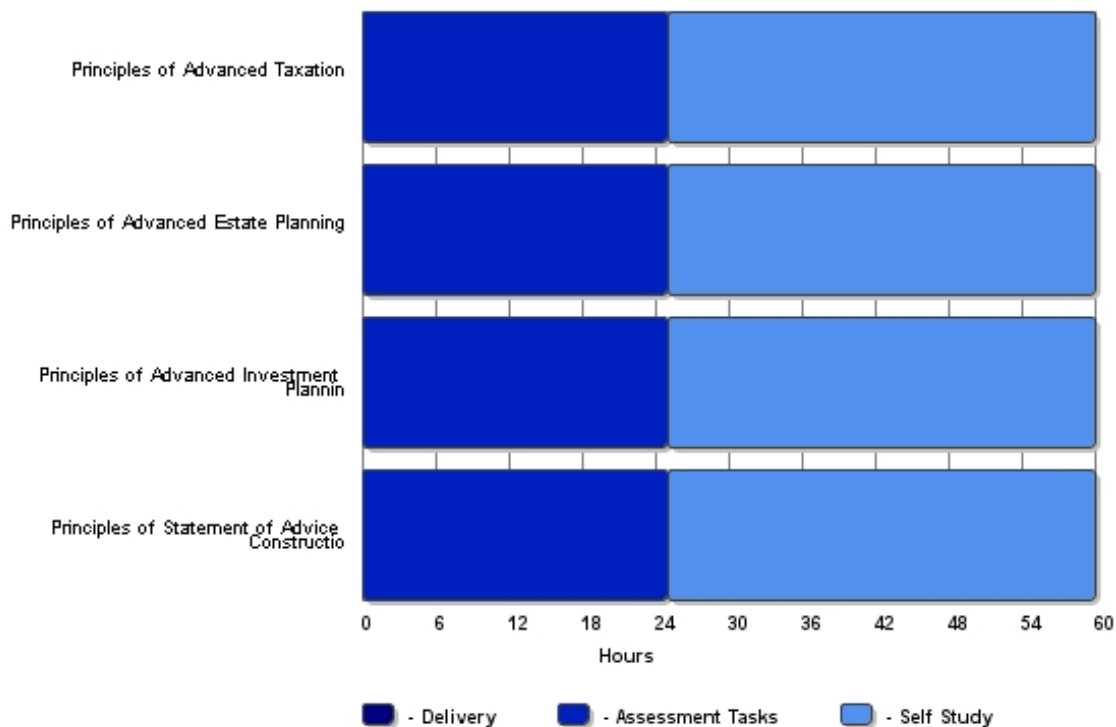
This course is currently being offered

COORDINATOR DETAILS

Name Ann Young
Phone Number 1300 88 33 46
Fax Number 03 8677 6911
Email Address education@iit.edu.au

COVERAGE GRAPH

International Institute of Technology Pty Ltd
Advanced Diploma of Financial Services (Financial Planning)
Topic Hours Allocation



TOPICS COVERAGE

Principles of Advanced Taxation

Introduction to Taxation Planning; Tax on Earned Income; Tax on Investment Income; Tax and Superannuation; Tax and Social Security; Fringe Benefits Tax; Goods and Services Tax (GST).

Principles of Advanced Estate Planning

Estate Planning; Estate Planning definitions; The adviser and regulatory issues; Transferring Assets between generations; Trusts; Assets in companies; Beneficiaries with particular needs; Important Issues;

Principles of Advanced Investment Planning

Investment Planning; Financial Mathematics and Portfolio Construction; Investment Styles and Strategies; Global and International Investing; Complex Financial Planning Strategies and Investments;

Principles of Statement of Advice Construction

Personal Financial Advice and compliance; The personal advice process; Analysis and research; Financial issues with personal objectives; Developing Complex and Innovative Financial Planning Strategies; Constructing the statement of Advice; Negotiate strategic recommendations and implement; Ongoing service and review

PROVIDER DETAILS

Provider International Institute of Technology Pty Ltd

Contact Ann Young

Phone Number 1300 88 33 46

Fax Number 03 8677 6911

Email Address education@iit.edu.au

URL www.iit.edu.au

Important Notice

This service is provided solely for general information purposes. By provision of the service ASIC does not provide legal or other professional advice. ASIC expressly disclaims any liability arising from use of the service. If you require legal or other expert advice or assistance, you should seek the services of a competent professional person.

Created by the Australian Securities and Investments Commission. <http://www.asic.gov.au>
Copyright © 2007 Australian Securities and Investments Commission.

Version 2.0