



'IIT courses are delivered by highly educated industry professionals, who have a wealth of 'real world' experience.'



## FNS50615 Diploma of Financial Planning Framework

IIT offer the FNS50615 Diploma of Financial Planning qualifications, which is comprised of FOUR specialist modules, which all include RG146 outcomes. The foundation module being Financial Planning in Practice (FPP) This is the prerequisite course to enrol in any or all of the other courses. The Investment course, Principles of Investment Planning (PIP) module, includes the RG146 areas of: Derivatives, Securities and Managed Investments. The next specialist advice area is Principles of Retirement and Superannuation (PRS) which covers the RG146 outcome of Superannuation. The last module is Principles of Risk Management (PRM) and covers the Life insurance RG146 outcome.

IIT also offer RG146 modules in SMSF, Foreign exchange and Margin lending outside of the Diploma, as well as the FNS60415 Advanced Diploma of Financial Planning.

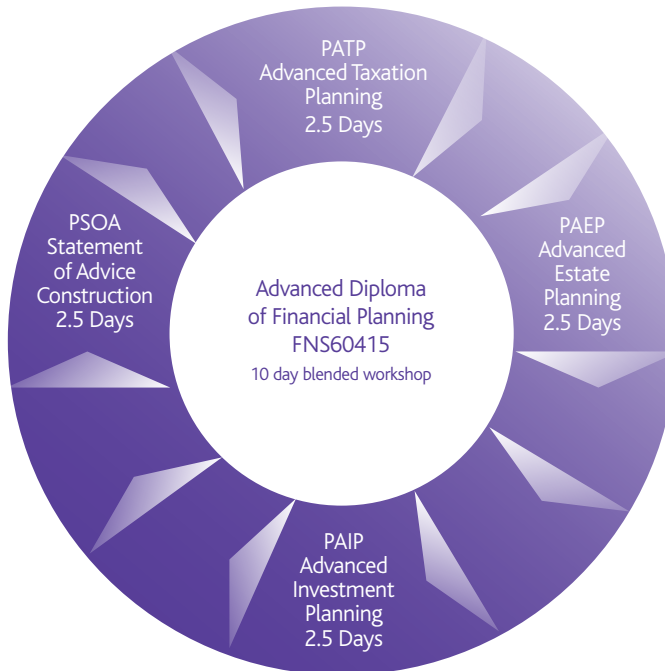


'In addition to these courses, IIT has an articulation agreement in place with Charles Sturt University (CSU) from our FNS60415 Advanced Diploma of Financial Planning. After completion of the Advanced Diploma IIT offer two Elective Masters Units which allow students to gain 4 credits into the CSU Master of Applied Finance.'

Please contact us for further information about this articulation pathway.



# FNS60415 Advanced Diploma of Financial Planning Framework



## > Principles of Advanced Taxation Planning (PATP)

Provides students with the specialist knowledge required to offer complex advice to clients on the Australian taxation system, income and investment tax, Capital Gains Tax, and investment gearing amongst other areas.

## > Principles of Advanced Estate Planning (PAEP)

Provides students with the specialist knowledge required to offer complex advice to clients on estate and succession planning issues, such as wills, trusts and death benefits from superannuation.

## > Principles of Advanced Investment Planning (PAIP)

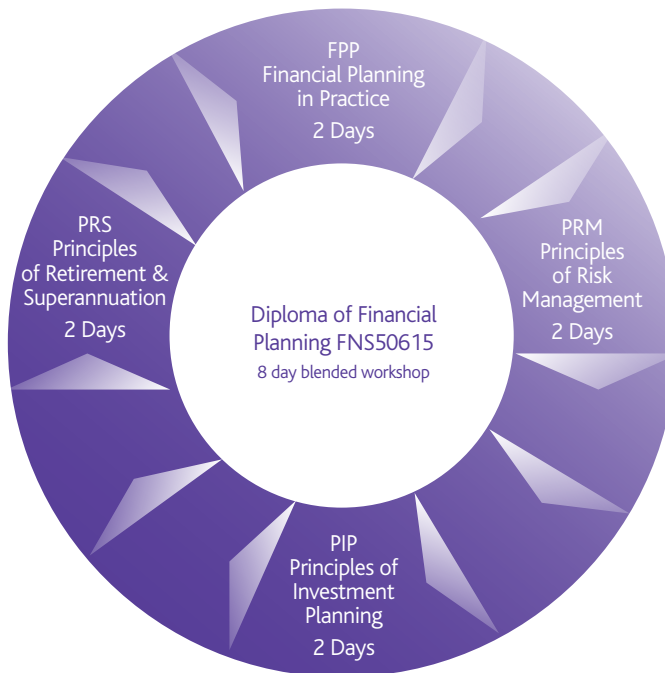
Provides students with the specialist knowledge required to offer complex advice to clients on investment styles, research, portfolio theory and construction.

## > Principles of Statement of Advice Construction (PSOA)

Provides students with the specialist knowledge required to complete complex financial planning strategies and construct a Statement of Advice (SOA).



# FNS50615 Diploma of Financial Planning Framework



## > Financial Planning in Practice (FPP)

Provides students with the framework and foundation to understand the financial planning process (including how to provide both general and personal advice).

## > Principles of Risk Management (PRM)

Provides students with the specialist knowledge to offer advice on general insurance, income protection, TPD, life insurance, business insurance and trauma insurance.

## > Principles of Investment Planning (PIP)

Provides students with the specialist knowledge required to offer advice on securities, managed investments, derivatives, risk profile management, asset allocation strategies and portfolio structures.

## > Principles of Retirement and Superannuation (PRS)

Provides students with the specialist knowledge to offer advice on superannuation including contributions, retirement income streams, pensions and taxation.







## The International Institute of Technology (RTO no. 21421) provides quality skills-based training courses necessary to accelerate your career in the fast growing financial services industry using:

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### > Accelerated Learning (in workshops)

Face-to-face workshops create a friendly classroom environment to enable learning in a timely and structured way. The sessions allow students to 'bounce ideas around' with other participants – not to mention the networking opportunities or achievement of corporate team goals. Facilitators are industry professionals with 'real world' experience who take the time to tell their 'war stories' which help explain the concepts in an exciting way. See the website for details of when and where these courses are running in each capital city or contact our office to arrange tailored corporate training solutions.

### > Distance (Self-Paced) Study

Distance or self-paced learning allows you to start a course when it suits you best. Moreover, it provides you with the flexibility to continue with your other commitments in life, such as work, parenthood and your social life. BEST OF ALL, this option gives you access to our Education Support Team comprised of experienced finance professionals who can discuss concepts, conduct skill-based role plays and provide feedback on any assessments submitted.

### > Recognition of Prior Learning (RPL)

Students with experience and/or previous qualifications in the financial services industry can have their knowledge recognised and receive a qualification with no formal assessments required. The process involves the compilation of a portfolio of evidence with the help of the IIT team.

### > Unlimited Telephone Support

Students undertaking any of our courses have access to our experienced Student Support Team to assist with any queries, discuss concepts, conduct skill-based role plays and provide feedback on any assessments submitted.

### > Qualification Pathway

Any course offered by IIT has a pathway leading to higher, nationally recognised qualifications and industry designations specifically designed for the Financial Services Industry participants.

## Taxation Law (for Tax Agents)

(2 units of competency required)

> **FNSACC502** Prepare tax documentation for individuals

This unit covers the skills and knowledge required to prepare non-complex income tax returns for individuals in accordance with statutory requirements, encompasses gathering and verifying data, calculating taxable income and reviewing compliance requirements.

> **FNSACC603** Implement tax plans and evaluate tax obligations

This unit covers the skills and knowledge required to assess taxation liabilities, optimise tax positions, establish processes and plans, evaluate tax policies and review tax compliance for legal entities.

## Commercial Law (for Tax Agents)

(3 units of competency required)

> **FNSTPB503** Apply legal principles in contract and consumer law

This unit covers the skills and knowledge required to research, analyse and apply legal principles to provide advice on contract and consumer law implications to clients.

> **FNSTPB504** Apply legal principles in corporations and trust law

This unit covers the skills and knowledge required to research and analyse legal principles and issues in corporations and trust law matters and then apply this knowledge to provide advice to clients.

> **FNSTPB505** Apply legal principles in property law

This unit covers the skills and knowledge required to research, analyse and apply legal principles to provide advice on property law matters to clients.

These courses can be completed online or in one of our public workshops over 5 full days.

\*In-house training can be arranged for a minimum of 5 staff at a time for most courses.

IIT also offer Accounting/Bookkeeping, Mortgage Broking and the Advanced Diploma of Leadership and Management qualifications.

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## Tax Law for Tax (Financial Advisors) (1 unit of competency required)

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- > **FNSTPB506** Apply taxation requirements when providing tax (financial) advice services

This unit describes the skills and knowledge required to research, identify and analyse the taxation requirements, including taxation administration, that apply to particular clients and circumstances.

## Commerical Law for Tax (Financial Advisors 1 unit of competency required)

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- > **FNSTPB507** Apply legal principles in commercial law when providing tax (financial) advice service

This unit describes the skills and knowledge required to research, identify and analyse commercial law principles and apply relevant principles to particular clients and their circumstances.





Please call us on 1300 88 33 46 to discuss your training needs with one of our friendly compliance staff or alternatively email us on [education@iit.edu.au](mailto:education@iit.edu.au)

For a full list of all of IIT's courses, please go to our website [www.iit.edu.au](http://www.iit.edu.au) and click on the courses tab.

