



INTERNATIONAL
INSTITUTE OF
TECHNOLOGY

RTO 21421

For more information about
courses and how to apply,
please contact IIT:

Sales: 1300 88 33 46
Facsimile: (03) 8677 6911
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www.iit.edu.au



RG146 Specialist Margin Lending

ASIC Accredited Course

Receiving the right qualifications will provide you with the **skills and knowledge you need** to give compliant advice to clients. This course will provide you with the specialist knowledge to offer advice in margin lending, gearing share portfolios and margin lending products.

Are you ready to expand your career possibilities?

We provide nationally recognised education that is both flexible and affordable. Our Margin Lending training can be completed by Distance Education or face-to-face to ensure all students are able to obtain a qualification that presents them with the best opportunities possible.

The Specialist Advisor Course is comprised of TWO modules:

Financial Planning in Practice (FPP)

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

Principles of Finance Applications (PFA)

Provides students with the specialist knowledge to offer advice in margin lending, gearing share portfolios and margin lending products.

The IIT Difference

The International Institute of Technology (RTO no.21421) provides quality skills based training courses necessary to become ASIC RG146 compliant and kick start your career in the fast growing financial services industry.

Entry Requirements	There are no entry or eligibility requirements for this course. However if you wish to only complete the Principles of Finance Applications – Margin Lending (PFA-ML) module you need to have previously attained the competency units contained in the modules Financial Planning in Practice (FPP) and Principles of Investment Planning (PIP) or the equivalent if you have previous studies with another provider, see below for competency unit listing. Evidence required upon enrolment.
Course Duration	The duration of the course will vary depending on each individual student and their prior experience and knowledge. 303 hours over a maximum of 8 months is the recommended timeframe for students new to the industry.
Assessments	True / False Questions (TF), Multiple Choice Questions (MCQ), Short Answer Questions (SAQ), Case study, Role-Play and Oral Assessments. For more information on assessments visit http://www.iit.edu.au/about/
Exemptions and Recognition of Prior Learning (RPL)	If you have completed previous studies in the financial services area, you may be eligible for some credits towards the course by way of course exemptions. For more information on course exemptions and recognition of prior learning, visit http://www.iit.edu.au/about/

Blended Delivery	Blended delivery includes a series of tutorial workshops combined with self-paced study. Our 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 and take the time to tell their war stories, which help explain the concepts in an exciting way.
Distance Education	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, it gives you access to our Distance Education Team who can discuss concepts, conduct skill-based role plays and provide feedback on any assessments submitted.
Qualification Pathway	This course has national recognition. This course counts as a partial completion towards the FNS50615 Diploma of Financial Planning
Related Courses	<ul style="list-style-type: none"> > FNS50615 - Diploma of Financial Planning > FNS60415 - Advanced Diploma in Financial Planning > RG146 Specialist Foreign Exchange Course > RG146 Specialist Risk Management > RG146 Specialist Investment Course > RG146 Specialist Self Managed Superannuation Funds Course > RG146 Specialist Superannuation Course

Units of Competency Covered

The RG146 Specialist Margin Lending Advisor course encompasses the following units of competency:

FNSASICZ503	Provide advice in Financial Planning
FNSINC401	Apply principles of professional practice to work in the financial services industry
FNSFPL501	Comply with financial planning practice ethical and operational guidelines and regulations
FNSFPL502	Conduct financial planning analysis and research
FNSFPL506	Determine client requirements and expectations
FNSIAD301	Provide general advice on financial products
FNSASIC301	Establish client relationship and analyse needs
FNSASIC302	Develop, present and negotiate client solution
FNSFPL503	Develop and prepare financial plan
FNSFPL505	Review financial plans and provide ongoing service
FNSFMK502	Analyse financial market products for client
FNSFMK503	Advise clients on financial risk
FNSFPL508	Conduct complex financial planning research
FNSINC501	Conduct product research to support recommendations
FNSIAD501	Provide appropriate services, advice and products to clients
FNSCUS505	Determine client requirements and expectations
FNSCUS506	Record and implement client instructions
FNSFPL504	Implement financial plan
FNSASICR503	Provide Advice in Margin Lending

IIT cannot guarantee completion as this is dependant on successful achievement of competencies and cannot guarantee employment outcome as IIT have no part in recruitment of external entities.



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