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

NATIONALLY RECOGNISED TRAINING

Australian Qualifications Framework

FNS50615 Diploma of Financial Planning

ASIC RG146 Accredited

To gain entry into the Australian financial services industry, you need RG146 compliance to demonstrate your understanding of the principles of financial planning – that's precisely what the IIT FNS50615 Diploma of Financial Planning offers! The FNS50615 Diploma of Financial Planning is available as Government Funded for eligible students.

Course Overview

Entry Requirements	There are no entry or eligibility requirements for this course
Course Duration	Most students find the timeframe to complete one module is approximately 60 hours. Each student is different, depending on their own individual learning needs and experience or prior knowledge. For workshop students, pre reading is essential. We have found students that are genuinely motivated to progress through the course, or who have had some prior knowledge and/or experience, are able to complete the full course in less than 12 months. Other students take up to 2 years. The key factors that influence course completion is a student's experience, time availability and work rate.
Assessments	True / False Questions (TF), Multiple Choice Questions (MCQ), Short Answer Questions (SAQ), Case Study, Role-Play (skills assessment based off the written Case Study - uploaded video for distance students or completed in workshop for blended students) and Oral Assessments (distance students)/Closed Book Assessment (blended students). For more information on assessments visit http://www.iit.edu.au/about
Required Resources	Hardware - to complete all of the assessments, learners will need a computer/ laptop, preferably with USB capabilities. Software - To complete all of the assessments, learners will need Microsoft Excel 2003 or later, Microsoft Word or later and internet connection.
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. *Some students may find that not all assessments can be completed within the workshop time-frame. Some assessments may need to be completed after the workshop and submitted via email for marking, this will depend on each individual students capability and knowledge. The workshop timeframe does not signify the total duration of the course, however no additional assessments are sent to students after the workshop timeframe, only areas needing to be finalised from the assessment booklets provided, are completed from home. Those working in the industry will finish the majority if not all of the course work in class, due to their experience and prior knowledge or RPL exemptions.*
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	> FNS60415 - Advanced Diploma of Financial Planning *This course has a pathway for articulation into several university degrees or Masters qualifications. CPD is awarded upon completion of the Advanced Diploma. IIT have articulation into Charles Sturt Universities Master of Applied Finance and you will receive exemptions from our Advanced Diploma of Financial Planning into this course.*

Packaging Requirements/Rules for FNS50615 Diploma of Financial Planning

Total number of units required: 15
9 Core units (MUST BE COMPLETED)
6 Elective units (At least ONE block of electives must be chosen)
IIT recommends due to industry requirements, that a student should complete the IIT FNS50615 Diploma of Financial Planning full course, which covers RG146 compliance in the following blocks/areas: Managed Investments, Superannuation, Derivatives, Securities and Life Insurance.

CORE UNITS - MUST BE COMPLETED
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 FNSFPL503 - Develop and prepare financial plan FNSFPL504 - Implement financial plan FNSFPL505 - Review financial plans and provide ongoing service FNSFPL506 - Determine client financial requirements and expectations BSBITU402 - Develop and use complex spreadsheets
PROVIDE ADVICE UNITS (1 BLOCK OF ELECTIVES TO CHOOSE FROM)
FNSASICR503 - Provide advice in margin lending 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 FNSFPL508 - Conduct complex financial planning research
FNSASICS503 - Provide advice in foreign exchange 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 FNSFPL508 - Conduct complex financial planning research
FNSASICT503 - Provide advice in managed investments 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 FNSFPL508 - Conduct complex financial planning research
FNSASICU503 - Provide advice in superannuation 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 FNSFPL508 - Conduct complex financial planning research
FNSASICV503 - Provide advice in derivatives FNSFMK502 - Analyse financial market products for client FNSFMK503 - Advise clients on financial risk FNSCUS505 - Determine client requirements and expectations FNSCUS506 - Record and implement client instructions FNSFPL508 - Conduct complex financial planning research FNSASIC301 - Establish client relationship and analyse needs
FNSASICW503 - Provide advice in securities FNSFMK502 - Analyse financial market products for client FNSFMK503 - Advise clients on financial risk FNSCUS505 - Determine client requirements and expectations FNSCUS506 - Record and implement client instructions FNSFPL508 - Conduct complex financial planning research FNSASIC302 - Develop, present and negotiate client solutions
FNSASICX503 - Provide advice in life insurance 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 FNSFPL508 - Conduct complex financial planning research
FNSSMS601 - Provide advice in self-managed superannuation funds FNSSMS501 - Invest self-managed superannuation fund assets FNSSMS505 - Support trustee in the selection and perfgormance monitoring of outsourced services FNSSMS602 - Apply taxation requirements when advising in self-managed superannuation funds FNSSMS603 - Apply legislative and operational requirements to advising in self-managed superannuation funds FNSFPL508 - Conduct complex financial planning research

IT 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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