



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
Email: education@iit.edu.au

www.iit.edu.au



Advanced Diploma of Financial Planning

Course FNS60415

The FNS60415 Advanced Diploma in Financial Planning enables you to demonstrate expertise in understanding the principles of complex financial planning. Complex requests such as taxation, estate planning and portfolio construction theory require a financial planner with advanced knowledge and skills.

Do you want a competitive advantage over the rest of the industry?

The nationally recognised FNS60415 Advanced Diploma of Financial Planning adds depth and credibility to your financial expertise, enabling you to address a greater range of client needs – not to mention, providing you with an educational pathway to greater career success and increased remuneration potential. The FNS60415 Advanced Diploma of Financial Planning is available as Government Funded for eligible students.

This course is comprised of FOUR specialist courses:

Principles of Advanced Taxation Planning (PATP)

Provides students with an insight into providing 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 an advanced perspective on offering 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 offer complex advice to clients on investment styles, research, portfolio theory and construction financial planning strategies and construct a Statement of Advice (SOA).

Course Overview

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

Entry Requirements	A Diploma of Financial Planning core units or Equivalent. Evidence required at time of enrolment.
Course Duration	The duration of the course will vary depending on each individual student and their prior experience and knowledge. 690 hours over a maximum of 12 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 is ASIC accredited and has national recognition. You may wish to articulate to a Bachelor of Finance or Masters in Applied Finance. For more information on universities with credit arrangements with IIT visit , http://www.iit.edu.au/about/pathways/
Professional Recognition	CPD points have been awarded for each module contained within the FNS60415 Advanced Diploma of Financial Planning, as well as the full qualification. For more information on specific points awarded, visit http://www.iit.edu.au/about/pathways/
Related Courses	<ul style="list-style-type: none"> > FNS50615 - Diploma of Financial Planning > RG146 Specialist Foreign Exchange Course > RG146 Specialist Margin Lending Course > RG146 Specialist Risk Management > RG146 Specialist Investment Course > RG146 Specialist Self Managed Superannuation Funds Course > RG146 Specialist Superannuation Course

Units of Competency Covered

To be awarded the FNS60415 Advanced Diploma of Financial Planning the following units of competency must be successfully achieved:

FNSFPL602	Determine client requirements and expectations with clients with complex needs
FNSFPL603	Provide comprehensive monitoring and ongoing service
FNSCUS506	Record and implement client instructions
FNSFPL604	Develop complex and innovative financial planning strategies
FNSFPL605	Present and negotiate complex and innovative financial plan
FNSFPL505	Review financial plans and provide ongoing service
FNSINC501	Conduct product research to support recommendations
FNSFPL601	Provide complex financial planning research
FNSPRM601	Establish, supervise and monitor practice systems to conform with legislation and regulations
FNSFPL606	Implement complex and innovative financial plan
FNSCUS505	Determine client requirements and expectations

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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