FNS60415
Advanced Diploma of Financial Planning

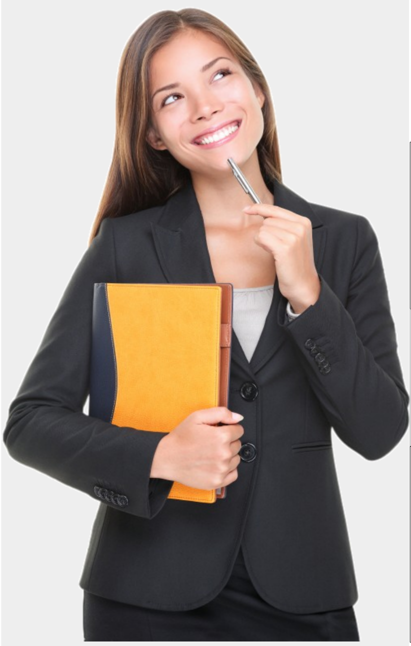
INTERNATIONAL INSTITUTE OF TECHNOLOGY

RTO 21421

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

Sales: 1300 88 33 46
Fax: (03) 8677 6911
Email: education@iit.edu.au

www.iit.edu.au



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. This course is available as Government Funded for eligible students.

IIT FNS60415 Advanced Diploma of Financial Planning also articulates students to Graduate Certificate of Finance with Charles Sturt University with 2 additional Master elective units IIT provides.

This course is comprised of 4 specialist modules:

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).

**For more information about registering as a financial advisor, please refer to this website - https://www.fasea.gov.au/consultations/proposed-guidance-on-qualification-pathways-for-all-advisers/*

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. Dual qualification in Diploma of Financial Planning and Advanced Diploma of Financial Planning available, call 1300 88 33 46 now for this special offer!
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 18 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 (skills assessment based off the written Case Study (video submission) and Over-the-phone Oral Assessment. 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
Distance Education	Distance Education is the most flexible of study options as it allows you to study anytime and anywhere. All reading material and assessments are accessed through the Moodle eLearning platform giving students flexibility to study while travelling or away from their desktop computer. This option also gives you access to our Distance Education Team comprised of experienced finance professionals who can discuss concepts 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; PAEP – 19.25, PAIP – 23, PATP – 17.25, PSOA – 15.75. For more information on specific points awarded, visit http://www.iit.edu.au/about/pathways/
Related Courses	> 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 > Compliance in Financial Planning & Planning Ethics and Taxation (elective Master units articulate to Master in Applied Finance with Charles Sturt University)

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 or cannot guarantee employment outcome as IIT have no part in the recruitment of external entities.

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NATIONALLY RECOGNISED TRAINING

Australian Qualifications Framework