



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
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www.iit.edu.au



RG146 Specialist Margin Lending 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.

**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/>*

This course is comprised of 2 modules:

Financial Planning in Practice (FPP)

Provides students with the framework and foundation to understand the financial planning process (only general advice required).

Principles of Finance Applications – Margin Lending (PFA-ML)

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

Course Overview

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) 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 (skills assessment based off the written Case Study (video submission) and Closed Book Online Quiz or Over-the-phone Oral Assessments. 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 has national recognition. This course counts as a partial completion towards the FNS50615 Diploma of Financial Planning.
Professional Recognition	This activity has been accredited for continuing professional development points by the Financial Planning Association of Australia but does not constitute FPA's endorsement of the activity. Accreditation number 006725 for 11.5 CPD points. 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 > 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:

FNSIAD301	Provide general advice on financial products and services
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
FNSASICR503	Provide Advice in Margin Lending

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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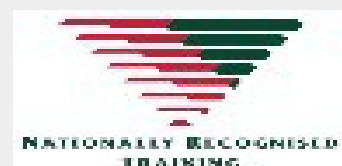
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Australian
Qualifications
Framework

