



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



FNS60920 Advanced Diploma of Paraplanning

The FNS60920 Advanced Diploma of Paraplanning enables you to demonstrate expertise in understanding the broad principles of financial planning and provide support to the Financial Adviser. Paraplanners provide a comprehensive range of financial planning services across a variety of product environments, including those involving complex issues and/or requiring innovative strategies.

At this level, individuals are expected to apply specialist skills and knowledge in a range of situations to deal with complex situations and issues. They will be expected to work across a broad range of technical or management functions and be accountable for personal outputs and for team outcomes and collaboration.

Do you want a competitive advantage over the rest of the industry? The nationally recognised FNS60920 Advanced Diploma of Paraplanning provides graduates with a broad knowledge and skills for working as a paraprofessional/ highly skilled worker and/or for further learning. Career opportunities include; Client service officer (financial institutions), Paraplanners, Finance administrator and Records officer.

This course is comprised of the following specialist topics:

Constructing Financial Plans

Provides students with the skills to record and implement client instructions, conduct financial planning research and analysis and understand organisational system compliance, and financial planning legislation and regulations in order to suggest innovative strategies and prepare statements of advice for clients. These skills assist paraplanner's in developing the specialist skills to construct a financial plan.

Superannuation

Provides students with skills and knowledge required to analyse client needs in regard to superannuation; and prepare advice ethically, professionally and in compliance with industry regulations and codes of practice

Managed Investments

Describes the skills and knowledge required to analyse client needs in regard to managed investments; and provide advice ethically, professionally and in compliance with industry regulations and codes of practice.

Life Insurance

Provides students with the skills and knowledge required to analyse client needs in life insurance; and prepare advice ethically, professionally and in compliance with industry regulations and codes of practice..

Securities

Provides students with the skills and knowledge required to analyse client needs in securities and prepare advice ethically, professionally and in compliance with industry regulations and codes of practice..

Course Overview

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

Course Duration	The duration of the course will vary depending on each individual student and their prior experience and knowledge. 655 hours over a maximum of 24 months is the recommended timeframe for students new to the industry.
Assessments	True / False Questions (TF), Multiple Choice Questions (MCQ), Short Answer Questions (SAQ), and Case Study Assessment. For more information on assessments visit http://www.iit.edu.au/about

Required Resources	<p><i>Hardware</i> - to complete all of the assessments, learners will need a computer/laptop, preferably with USB capabilities.</p> <p><i>Software</i> - To complete all of the assessments, learners will need Microsoft Excel 2003 or later, Microsoft Word or later and internet connection.</p>
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.

Units of Competency Covered

To be awarded the FNS60920 Advanced Diploma of Paraplanning the following units of competency must be successfully achieved:

FNSCUS516	Record and implement client instructions
FNSFPL614	Develop Financial Plans
FNSFPL615	Present and negotiate financial plans
FNSFPL616	Implement financial plans
FNSFPL621	Comply with ethical and operational guidelines, legislation and regulations in financial planning
FNSFPL622	Conduct financial planning analysis and research
FNSPRM611	Monitor and review organisational system compliance with legislation and regulations
FNSINC411	Conduct work according to professional practices in the financial services industry
FNSINC511	Conduct financial product research to support product recommendations
FNSFPL609	Prepare advice in Managed Investments
FNSFPL610	Prepare advice in Superannuation
FBSFPL618	Prepare advice in Securities
FNSFPL619	Prepare advice in Life Insurance

Optional Elective units in SMSF Knowledge

FNSSMS511	Invest Self-Managed Superannuation Funds Assets
FNSSMS515	Support Trustees in the Selecting and Monitoring Performance of Outsourced Services

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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