

# ADVANCED DIPLOMA IN FINANCIAL PLANNING

COURSE CODE: FNS60415



Ready to take the next step in your financial planning career? Financial planners are in high demand in the job market. Now is the time to upskill, get qualified and secure a successful career in this fast growing industry. Our Advanced Diploma of Financial Planning will prepare you with the knowledge, skills and competencies that the industry looks for in modern professionals.

If you have completed the Diploma of Financial Planning you are ready to progress to our Advanced Diploma of Financial Planning. Gain specialised knowledge to provide a comprehensive range of financial planning services across a variety of products, including those involving complex issues and innovative strategies. Individuals in these roles require well-developed skills, a broad knowledge of the financial planning sector and the ASIC regulatory framework, which will be acquired upon completion.

Please note: From 1 January 2019, all new advisers will need to hold an approved degree and from 1 January 2024, all financial advisers must meet these new requirements.



## COURSE DELIVERY: ONLINE

**Tutorial support:** Available on Mondays, 6:00 pm to 9:00 pm at Meadowbank, P Block, Level 5.

**Course length:** 12 months

A dedicated online teacher manages the learning environment, communicates with students, supports student learning and provides feedback on work submitted.

## CAREER OPPORTUNITIES

On completion of this qualification, you will be able to work across a broad range of technical and management functions, overseeing personal and team outcomes. Apply for positions as:

- Financial Planner
- Paraplanner
- Business Development Officer
- Customer facing roles in Finance, Insurance and Banking

## LEARNING PATHWAYS

By completing the Advanced Diploma of Financial, you would be eligible to enter our Bachelor of Commerce (Majoring in Accounting or Financial Planning) available in 2018.

For further information about our degree programs go to [tafensw.edu.au/course-areas](https://tafensw.edu.au/course-areas).

## ENTRY REQUIREMENTS

It is a mandatory requirement that students only enrol in the Advanced Diploma of Financial Planning if they have fully completed the Diploma of Financial Planning. To help us assess your suitability for this course you will need to establish that you have completed an appropriate Diploma of Financial Planning.

## COURSE STRUCTURE

The Advanced Diploma of Financial Planning covers four clusters. Each cluster will have one or more tests and assignments.

### PRACTICE MANAGEMENT AND COMPLIANCE

**FNSFPL603** Provide comprehensive monitoring and ongoing service

**FNSPRM601** Establish, supervise and monitor practice systems to conform with legislation and regulations

**FNSPRM602** Improve the practice

**FNSFPL601** Provide technical and professional guidance

### SUPERANNUATION AND RETIREMENT PLANNING

**FNSASICU503** Provide advice in Superannuation

### MANAGED INVESTMENT

**FNSASICT503** Provide advice in Managed Investments

### COMPLEX FINANCE ADVICE

**FNSFPL602** Determine client requirements and expectations for clients with complex needs

**FNSFPL508** Conduct complex financial planning research

**FNSFPL604** Develop complex and innovative financial planning strategies

**FNSFPL605** Present and negotiate complex and innovative financial plans

**FNSFPL606** Implement complex and innovative plans

# THE BENEFITS OF OUR ONLINE ADVANCED DIPLOMA

## + ONLINE

Fit study around your work and lifestyle.  
Classroom tutorial support is available, if required.

## + RECOGNITION OF PRIOR LEARNING

Get your prior learning or experience credited towards a course of study.

## + GOVERNMENT SUBSIDISED

The government will pay part of your fee and you pay the balance if eligible.

## FEES AND ASSISTANCE

When you enrol you will need to pay a student fee, unless you qualify for a full fee exemption. The student fee will vary depending on the course you choose, whether the course is government subsidised and what level of subsidy you are eligible for.

For more information, visit [tafensw.edu.au/get-started-at-tafe-nsw/payment-options-and-assistance](http://tafensw.edu.au/get-started-at-tafe-nsw/payment-options-and-assistance)

## TERMS AND CONDITIONS

This document is intended as a general guide only. TAFE NSW reserves the right to alter any courses or admission requirements herein without any further notice.

For more information about fees, refunds, payment options etc., please refer to the section 'Get started at TAFE NSW' on the TAFE website:

[tafensw.edu.au/get-started-at-tafe-nsw](http://tafensw.edu.au/get-started-at-tafe-nsw).

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