

# DIPLOMA OF FINANCIAL PLANNING

NATIONAL CODE: FNS50615



**Gain communication and technical skills to succeed as a financial planner with this highly regarded industry relevant course.**

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.

## COURSE DELIVERY: ONLINE

This online program allows you to complete your Diploma of Financial Planning in one year. Studying online, anywhere, anytime means you can control your own learning at a pace you are comfortable with.

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

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

### Tutorial support:

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

## ASSESSMENTS

A range of assessment methods are used in this course. These may include case studies, projects, practical exercises and reports, providing you with a well-rounded portfolio of work experience.

## CAREER OPPORTUNITIES

The Diploma of Financial Planning is approved by the Australian Securities and Investments Commission (ASIC) and meets the minimum licensing requirement for a career as:

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



## LEARNING PATHWAYS

Students who complete this course may continue with a pathway that leads to the Advanced Diploma of Financial Planning. By completing the Diploma of Financial Planning, you could 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://www.tafensw.edu.au/course-areas).

## ENTRY REQUIREMENTS

There are no formal education requirements unless seeking VET Student Loan. To help us assess your suitability for this course you may be asked to provide evidence of your previous qualifications and experience.

Connect with us!



**TAFE**<sup>NSW</sup>

[tafensw.edu.au](https://www.tafensw.edu.au)

Phone 131 601

## COURSE STRUCTURE

This course requires completion of 15 units of competency. The units delivered in this course are:

<b>BSBITU402</b>	Develop and use complex spreadsheets
<b>FNSASICZ503</b>	Provide advice in financial planning
<b>FNSFPL501</b>	Comply with financial planning practice ethical and operational guidelines
<b>FNSFPL502</b>	Conduct financial planning analysis and research
<b>FNSFPL503</b>	Develop and prepare financial plans
<b>FNSFPL504</b>	Implement financial plans and provide ongoing service
<b>FNSFPL505</b>	Review financial plans and ongoing service
<b>FNSFPL506</b>	Determine client financial requirements and expectations
<b>FNSINC401</b>	Apply principles of professional practice to work in the financial services industry
<b>FNSCUS505</b>	Determine client requirements and expectations
<b>FNSFPL508</b>	Conduct complex financial planning research
<b>FNSINC501</b>	Conduct product research to support recommendations
<b>FNSIAD501</b>	Provide appropriate services, advice and products to clients
<b>FNSCUS506</b>	Record and implement client instructions
<b>FNSASICX503</b>	Provide advice in life insurance
<b>RG146</b>	<b>Compliance Statement of Attainment</b> – \$99 Upon completion of the Diploma of Financial Planning, enrol in the following 2 units to satisfy the requirements under ASIC RG146

### STATEMENTS OF ATTAINMENT

<b>FNSASICU503</b>	Provide advice in Superannuation
<b>FNSASICT503</b>	Provide advice in Managed Investments

It is strongly recommended that all students enrol in this Statement of Attainment on completion of the Diploma of Financial Planning.

**BE  
AMBITIOUS**



# THE BENEFITS OF OUR ONLINE 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](https://www.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](https://www.tafensw.edu.au/get-started-at-tafe-nsw).

[tafensw.edu.au](https://www.tafensw.edu.au) Phone 131 601