Advanced Diploma
Financial Planning

Start today
1300 738 955

5 star education experience
★ RG146 / ASIC compliant
★ Nationally accredited courses
★ Qualified trainers with extensive financial planning experience
★ Engaging and carefully structured course materials
★ Course notes written by Financial Advisers

Education for the real world
A financial planning course to *build the future you want*

To further your career in the financial services industry, the Advanced Diploma in Financial Planning provides you with more in-depth skill-sets and technical knowledge that will open doors to better job opportunities and career options. Completion of the Advanced Diploma of Financial Planning provides a pathway to a university qualification.
Our students come from a range of backgrounds

- You might be a school leaver, uni student, graduate or someone who is changing careers. You may want to build a career in the financial services industry.

- You might be a paraplanner, accountant or someone working within a bank, insurance or superannuation company. You may be working within the industry and want to build on your existing knowledge and experience.

Study anywhere and anytime you choose

Face-to-face workshops

- Attend 8 days (or evening equivalent) of accelerated learning workshops plus complete pre-reading and post workshop assessments.

- Study at Monarch training centres across Australia. We provide onsite training for group instruction at your office where requested. View the workshop timetable at www.monarch.edu.au/timetable

Accelerated learning can be achieved by attending face-to-face workshops conducted in a classroom environment. They enable you to learn efficiently in a structured and engaging environment. You can interact and network with other students under the guidance of industry professionals who “bring the course to life” and provide a “real world” perspective.

Distance/Online learning

- Study at your own pace (take up to 18 months). There is no minimum timeframe for completion as it is dependent on your previous education, work experience, time availability and work rate.

- Enrol anytime to commence this course!

Distance / Online learning allows you to start a course when and where it is convenient for you to study. Distance learning is particularly popular with stay-at-home parents, full time employees, or anyone seeking maximum flexibility. You will be well supported throughout your course by Monarch’s dedicated distance education support team, available both over the phone and online.
Government funding – 
are you eligible?

Jobs for Your Future

This initiative means that if you wish to gain an Advanced Diploma of Financial Planning, and you are eligible, you will only have to pay $495 (normally $3,000+) and the Government will subsidise the balance. You DO NOT have to repay the Government – the funding is not a loan.

To be eligible for Skills Victoria Funding you must meet the following criteria:

- Be an Australian citizen or permanent resident
- Be 16 years or older
- Not hold an equivalent advanced diploma or higher qualification than this advanced diploma.

Please see our website for further information or call us on 1300 738 955.
Course outline

ADFP 1 – Advanced Investments
- What is investment risk?
- Risk and diversification
- How to measure risk
- Understanding correlation coefficients
- Measures of risk adjusted returns
- Valuation of shares
- Valuation of bonds
- Introduction to derivatives
- Options contracts
- Application of investment principles in financial planning

ADFP 2 – Estate Planning
- Creating a will
- Role of the executor
- Client needs and estate planning
- Powers of attorney
- The rights of beneficiaries
- Administration of an estate
- Trusts and estate planning
- Taxation and estate planning
- Provision of advice
- Application of estate planning principles in financial planning

ADFP 3 – Social Security & Taxation Planning
- Australian social security system
- Income test and assets test
- Social security and income streams
- Pensions and allowances
- Eligibility for the age pension
- Taxation and the age pension
- Pay-as-you-go (PAYG) withholding
- Goods and Services Tax (GST)
- Dividend imputation
- Fringe benefits tax
- Capital gains and capital losses
- Taxation for minors

ADFP 4 – Practice Management
- Marketing fundamentals
- Software and client relationship management systems
- Practice management principles applied to superannuation
- Practice management principles applied to insurance
- Tips and traps of implementing insurance policies
- Deciding on an investment philosophy
- Core and satellite approach to investing
- Blending managers
- Using platforms in a practice
- Different types of debt
- Debt management strategies
- Margin lending
- Debt recycling
- Client file requirements
- Provision of advice

Accredited – RG146 / ASIC compliant

Monarch Institute’s Advanced Diploma of Financial Planning is Government accredited. It has National recognition under the Australian Qualifications Framework (AQF) meaning it can be used as a pathway to a university qualification, nationwide. The course is ASIC compliant, having been approved by ASIC authorised assessors in meeting ASIC Policy Statement 146 (known as RG146) and is listed on the ASIC training register.
Employment opportunities

Completing the Advanced Diploma in Financial Planning can propel both a financial adviser’s career, as well as other careers within the financial services industry. Banks, fund managers, investment platform providers, investment research houses, superannuation funds, stock brokers, credit unions, accounting practices, financial planning practices, mortgage broking businesses, insurance firms, business brokers and real estate agencies, would consider an Advanced Diploma of Financial Planning a valuable qualification.

Assessments

You are required to complete a variety of assessment tasks demonstrating your skills and knowledge. These include:

- Online case studies
- Online multiple choice and short answer questions
- Role plays or simulation exercises
- Online Projects

Enrol today

Commence your Advanced Diploma of Financial Planning with Monarch Institute today to successfully launch your career!

To discuss the course that’s right for you call us on 1300 738 955

To find out more information email us on admin@monarch.edu.au

To enrol, visit our website www.monarch.edu.au