RG146
Managed Investments

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*

This course delivers the knowledge and skills required to provide RG146 compliant Managed Investment advice (ie. both general AND personal advice).

Students choose to enrol in this course for a number of reasons. Some are interested in becoming Managed Investment Advisers. Others just want to upgrade their existing qualifications to be RG146 compliant, so they can continue to deliver advice in Managed Investments.
Our students come from a range of backgrounds

Study anywhere and anytime you choose

Face-to-face workshops

- Attend 4 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 9 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.

• 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.
Course outline

DFP 1 - Foundations of Financial Planning
- Fundamentals of the Australian economy
- Financial markets & participants
- Regulatory environment
- Australian licensing framework
- Establishing client relationships
- The six step process
- Identifying client goals and objectives
- Analysing client risk profile
- Developing financial planning strategies
- Presenting strategies to clients
- Implementation of strategies
- Code of ethics
- Introduction to taxation
- Introduction to social security
- Estate planning fundamentals
- Risk management within a financial services office

DFP 2 – Investment Planning
- Key asset classes
- Securities – money market instruments
- Securities – fixed interest and bonds
- Securities – property
- Securities – shares
- Securities – alternative investments
- Risk and return
- Investing in each asset class
- Difference between income and growth
- Dollar cost averaging
- Diversification
- Managed investments
- Index funds
- Fund managers
- Investment platforms
- Strategic asset allocation
- Tactical asset allocation
- Time value of money
- Application of investment principles

Accredited – RG146 / ASIC compliant

Managed Investments is an exciting and dynamic area of advice within the financial services industry. Any person who provides Managed Investments advice must have an industry specific accreditation (known as RG146 certification) to be ASIC compliant.
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

Further study options

Completion of this RG146 Compliant Managed Investments course means you have automatically completed the requirements for 50% of the Diploma of Financial Planning. You only have to complete 2 additional modules in order to receive the full Diploma of Financial Planning.

Enrol today

Commence your RG146 Managed Investments course 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