MONARCH INSTITUTE

FNS60415 *Advanced Diploma of* 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

RTO Code - 22530

Nationally Recognised Training

A financial planning course to ***build the future you want***

To further your career in the financial services industry, the FNS60415 Advanced Diploma of 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 FNS60415 Advanced Diploma of Financial Planning provides a pathway to a university qualification.

What does the ***Advanced Diploma cover?***

- Advanced Investments
- Estate Planning
- Social Security and Taxation Planning
- Practice Management

Course modules / Overview

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
- Futures contracts
- Options contracts
- Application of investment principles in financial planning
- Margin Lending

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 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 FNS60415 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.

In addition, this 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 at: http://asic.gov.au/eTraining/eTrain.nsf

Monarch Institute is licensed as a Registered Training Organisation (RTO number 22530) under the Australian Skills Quality Authority (ASQA), which is an Australian Government statutory body regulating nationally recognised training.

Study anywhere and anytime you choose

Face-to-face workshops - CBD training

- Course content delivered by industry experts
- Conducted in a 'small class room' environment (i.e. no more than 10 students per trainer) to ensure quality training
- Interact and network with other students under the guidance of industry professionals who "bring the course to life" and provide a "real world" perspective.
- Access to an online portal that contains your learning and assessment materials, plus student forums, to support your face-to-face workshops.
- Onsite training for group instruction at your office where requested (minimum 6 staff).

Online/Self paced - maximum flexibility

- Start anytime, study anywhere, at your own pace
- Access your learning and assessment resources, plus student forums using an online portal. You can access this anywhere and anytime.
- Ongoing support from your qualified Trainer/Assessor via phone and email from Monday to Friday.

Course duration

Most students complete this qualification in 12 months to 24 months. Your completion time frame depends on your previous education, work experience, time availability and work rate. Please note you are expected to complete at least 1 module every 6 months.

We consistently receive feedback from our students telling us the course is very well structured and easy-to-follow.

Our students come from a range of backgrounds

- You might have completed a Financial Planning Diploma, be a uni student, a 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.

Why choose Monarch?

- Dedicated support from qualified trainers
- Clear and concise course materials
- A student online portal that's easy to navigate
- Friendly and efficient student support team

Assessments

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

- Case studies
- Projects
- Simulated workplace exercises
- Short answer questions
- Calculation exercises
- Multiple choice questions
- Scenario based questions

What are the entry requirements for this qualification?

- Completion of the Diploma of Financial Planning in the Financial Services Training Package (code FNS10)

  or

- Evidence of equivalent competency to the above units through recognition of prior learning (RPL).

People with disabilities are encouraged to apply.

Course costs

Monarch's courses are competitively priced. Check our website for the most up-to-date prices at www.monarch.edu.au/courses or call us on 1300 738 955.

This training is delivered with Victorian and Commonwealth Government funding for eligible Victorian residents. Please contact Monarch to see if your eligible.

Jobs & Career pathways once completing this qualification

Completing the FNS60415 Advanced Diploma of Financial Planning can advance 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 FNS60415 Advanced Diploma of Financial Planning a valuable qualification.

Will my previous experience or study count?

Monarch Institute recognises Recognition of Prior Learning (RPL) which takes into account the knowledge and skills you have already gained through your previous education and work history, attributing this to your FNS60415 Advanced Diploma of Financial Planning. These may be through formal or informal training and can result in credits towards your qualification. We also offer Credit Transfer (CT). More information about RPL or CT is contained in Monarch's Student Information Guide, which you can access on our website http://www.monarch.edu.au/student-info/

National units of competency course codes

Code & Title	Core/Elective
Core	
FNSFPL508 Conduct complex financial planning research	Core (50 Nominal Hours*)
FNSFPL601 Provide technical and professional guidance	Core (40 Nominal Hours*)
FNSFPL602 Determine client requirements and expectations for clients with complex needs	Core (50 Nominal Hours*)
FNSFPL603 Provide comprehensive monitoring and ongoing service	Core (40 Nominal Hours*)
FNSFPL604 Develop complex and innovative financial planning strategies	Core (50 Nominal Hours*)
FNSFPL605 Present and negotiate complex and innovative financial plans	Core (40 Nominal Hours*)
FNSFPL606 Implement complex and innovative financial plan	Core (50 Nominal Hours*)
FNSPRM601 Establish, supervise and monitor practice systems to conform with legislation and regulations	Core (60 Nominal Hours*)
Electives	
FNSFMK502 Analyse financial market products for client	Elective (50 Nominal Hours*)
FNSFMK503 Advise clients on financial risk	Elective (60 Nominal Hours*)
FNSCUS506 Record and Implement client instructions (This unit is a pre-requisite for FNSASICR503)	Elective (75 Nominal Hours*)
FNSINC501 Conduct product research to support recommendations (This unit is a pre-requisite for FNSASICR503)	Elective 80 Nominal Hours*)
FNSIAD501 Provide appropriate services, advice and products to clients (This unit is a pre-requisite for FNSASICR503)	Elective (150 Nominal Hours*)
FNSCUS505 Determine client requirements and expectations (This unit is a pre-requisite for FNSASICR503)	Elective 70 Nominal Hours*)
FNSASICR503 Provide advice in margin lending	Elective (50 Nominal Hours*)

* Nominal Hours are the anticipated hours of supervised learning or training deemed necessary to conduct training and assessment activities associated with the program of study. These hours are determined by the Victorian State Training Authority. Nominal hours may vary for a qualification depending on the units of competency selected.

What key areas are covered in the course?

- Investment Risk
- Margin Lending
- Estate Planning
- Social Security
- Taxation Planning
- Practice Management

Enrol today

Commence your FNS60415 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 at
info@monarch.edu.au

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

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