

(Part of FNS50615 Diploma of Financial Planning)

RG146 Self-Managed Superannuation Funds

- meets the ASIC 'Accountant Exemption' guidelines

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

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

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

Students choose to enrol in this course for a number of reasons. Some are interested in becoming Superannuation Advisers. Others just want to upgrade their existing qualifications to be RG146 compliant, so they can continue to work in various roles within the Australian Financial Services sector.

Are you an Accountant or Tax Agent?

As a result of the ASIC 'Accountant Exemption' guidelines, many Accountants and Tax Agents are choosing to obtain RG146 SMSF accreditation in order to meet their regulatory requirements, and to provide advice on Superannuation and SMSF's. For more information go to <https://www.asic.gov.au>.

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. 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/>

Jobs & career pathways once completing this qualification

This RG146 qualification will provide you with a range of employment opportunities within the financial services industry. Many employment positions in the financial services industry require an RG146 qualification, including: banks, Life Insurance providers, superannuation funds, credit unions, accounting practices, financial planning practices, mortgage broking businesses, business brokers and real estate agencies.

Course modules / Overview

DFP 1 - Foundations of Financial Planning

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

DFP 3 - Superannuation & Retirement Planning

- Superannuation in Australia
- Accumulation funds and defined benefit funds.
- Who can contribute into superannuation
- Identify the different kinds of contributions
- Taxation and superannuation earnings
- The superannuation guarantee
- The government co-contribution
- Super splitting and how it works
- Salary sacrifice and how it is applied
- Strategies and case studies
- The role and responsibility of superannuation trustees.
- How SMSF's operate
- The mechanics of a superannuation pension
- Preservation age and accessing superannuation
- The tax applicable to superannuation benefits
- Borrowing within an SMSF
- Insurance within an SMSF
- Winding up on SMSF

Accredited – RG146 / ASIC compliant

Monarch Institute's FNS50615 Diploma of Financial Planning (RG146 Compliant) is Government accredited. This RG146 Self-Managed Superannuation course constitutes 50% of the FNS50615 Diploma of Financial Planning. It has National recognition under the Australian Qualifications Framework (AQF) meaning it can be used as a pathway to further Vocational Education & Training and a university qualification, nationwide.

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. 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>

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 6 months to 12 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 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.

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?

There are no entry requirements for this qualification, just your drive, motivation and passion for the industry.

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.

Further study options

Completion of this RG146 Compliant Self-Managed Superannuation course means you have automatically completed the requirements for 50% of the FNS50615 Diploma of Financial Planning. You only have to complete 2 additional modules in order to receive the full Diploma of Financial Planning.



National units of competency course codes

Code & Title	Hours
FNSFPL501 Comply with financial planning practice ethical and operational guidelines and regulations	50 Nominal Hours*
FNSFPL505 Review financial plans and provide ongoing service	40 Nominal Hours*
FNSIAD501 Provide appropriate services, advice and products to clients	150 Nominal Hours*
FNSCUS505 Determine client requirements and expectations	70 Nominal Hours*
FNSCUS506 Record and implement client instructions	75 Nominal Hours*
FNSFPL502 Conduct financial planning analysis and research	50 Nominal Hours*
FNSFPL503 Develop and prepare financial plan	60 Nominal Hours*
FNSASICU503 Provide advice in Superannuation	50 Nominal Hours*
FNSSMS501 Invest self-managed superannuation funds assets	60 Nominal Hours*
FNSSMS505 Support trustee in the selection and performance monitoring of outsourced services	50 Nominal Hours*
FNSSMS601 Provide advice in self-managed superannuation funds	100 Nominal Hours*
FNSSMS602 Apply taxation requirements when advising in self-managed superannuation funds	80 Nominal Hours*
FNSSMS603 Apply legislative and operational requirements to advising in self-managed superannuation funds	120 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.

Enrol today

Commence your RG146 Self-Managed Superannuation Funds 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 **info@monarch.edu.au**



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