

Tax (Financial) Advisers

From 1 January 2016 individuals need to meet the qualifications and/or experience requirements to operate as a Tax (Financial) Adviser with the Tax Practitioners Board (TPB).

What education requirements must be completed?

If you are in categories **A** or **B** (see table below) you are required to complete the following TPB approved courses:

- **AUSTRALIAN TAX LAW**
- **COMMERCIAL LAW**

Do you need further education to register as a Tax (Financial) Adviser with the TPB?

Unless you are in category **C**, you will need further education.

Qualification/professional membership	Further education required	Required relevant experience
Category A Tertiary qualification	Yes	Equivalent of 12 months full-time in the preceding 5 years
Category B Diploma or Advanced Diploma	Yes	Equivalent of 18 months full-time in the preceding 5 years
Category C Membership of professional association*	No	Equivalent of 6 years full-time in the preceding 8 years

Monarch Institute is registered with the TPB as an Approved Provider. **Monarch's courses** are TPB approved and include:

Australian Tax Law: • **Apply Taxation Requirements**

Commercial Law: • **Legal Principles in Commercial Law**

* Must be a voting member of a recognised tax (financial) adviser or tax agent association (e.g. AFA, FPA, CA ANZ, CPA).
For more details of qualifications and experience refer www.tpb.gov.au