# 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.

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<tr>
<th>Qualification/professional membership</th>
<th>Further education required</th>
<th>Required relevant experience</th>
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| **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 |

* 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](http://www.tpb.gov.au)

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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

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Monarch Institute 1300 738 955  
[WEBSITE](http://www.monarch.com.au)