

REPORT 2



MONARCH INSTITUTE PTY LTD

Enrolments and completions by Units of Competency

Year 2013, Offshore flag: N

Unit of Competency	Description	Enrolments	Completions
FNSSMS501A	INVEST SELF-MANAGED SUPERANNUATION FUNDS ASSETS	57	39
FNSSMS505A	SUPPORT TRUSTEE IN THE SELECTION AND PERFORMANCE MONITORING OF OUTSOURCED SERVICES	57	39
FNSSMS601A	PROVIDE ADVICE IN SELF-MANAGED SUPERANNUATION FUNDS	57	39
FNSSMS602A	APPLY TAXATION REQUIREMENTS WHEN ADVISING IN SELF-MANAGED SUPERANNUATION FUNDS	57	39
FNSSMS603A	APPLY LEGISLATIVE AND OPERATIONAL REQUIREMENTS TO ADVISING IN SELF-MANAGED SUPERANNUATION FUNDS	57	39
BSBFIA401A	Prepare financial reports	25	8
BSBITU306A	Design and produce business documents	11	9
BSBITU402A	Develop and use complex spreadsheets	362	226
BSBWHS201A	Contribute to health and safety of self and others	11	9
FNSACC301A	Process financial transactions and extract interim reports	42	13
FNSACC403B	Make decisions in a legal context	9	7
FNSACC404A	Prepare financial statements for non-reporting entities	14	5
FNSACC405A	Inventory	25	8
FNSACC406A	Set up and operate a computerised accounting system	14	6
FNSASICT503A	Provide advice in managed investments	362	224
FNSASICU503A	Provide advice in Superannuation	292	207
FNSASICW503A	Provide advice in securities	350	211
FNSASICX503A	Provide advice in Life Insurance	222	182
FNSASICZ503A	Provide advice in Financial Planning	224	185
FNSBKG401A	Develop and implement policies and procedures relevant to bookkeeping activities	8	6
FNSBKG402A	Establish and maintain a cash accounting system	42	13
FNSBKG403A	Establish and maintain an accrual accounting system	42	13
FNSBKG404A	Carry out business activity and instalment activity statement tasks	25	9
FNSBKG405A	Establish and maintain a payroll system	25	8
FNSCUS505A	Determine client requirements and expectations	471	277

FNSCUS506A	Record and implement client instructions	522	296
FNSFMK502A	Analyse financial market products for client	50	19
FNSFMK503A	Advise clients on financial risk	50	19
FNSFPL501A	Comply with financial planning practice ethical and operational guidelines and regulations	472	278
FNSFPL502A	Conduct financial planning analysis and research	294	209
FNSFPL503A	Develop and prepare financial plan	294	209
FNSFPL504A	Implement financial plan	224	185
FNSFPL505A	Review financial plans and provide ongoing service	471	278
FNSFPL506A	Determine client requirements and expectations	362	226
FNSFPL508A	Conduct complex financial planning research	50	19
FNSFPL601A	Provide technical and professional guidance	40	21
FNSFPL602A	Determine client requirements and expectations for clients with complex needs	50	19
FNSFPL603A	Provide comprehensive monitoring and ongoing service	34	15
FNSFPL604A	Develop complex and innovative financial planning strategies	44	20
FNSFPL605A	Present and negotiate complex and innovative financial plans	44	20
FNSFPL606A	Implement complex and innovative financial plans	34	15
FNSIAD501A	Provide appropriate services, advice and products to clients	471	277
FNSINC401A	Apply principles of professional practice to work in the financial services industry	371	233
FNSINC501A	Conduct product research to support recommendations	362	225
FNSPRM601A	Establish, supervise and monitor practice systems to conform with legislation and regulations	34	15
FNSSUP508A	Provide effective information to members	1	1