MONARCH INSTITUTE

Investments

RG146 compliant

(Partial completion of FNS50615)

- Get the skills that employers really want.
- Unrivalled support. Delivered with care.
- Absolute flexibility. Your way, your terms.

Education for the real world

RTO Code - 22530

Nationally Recognised Training

Launch your investment advice career today

According to research done on behalf of the Australian Securities and Investments Commission, less than 40% of Aussie adults understand basic investment principles like risk/return and diversification. 11% have recently lost money they couldn't afford to lose on an investment. Long story short, there's never been a greater need for effective, ethical investment advice.

It's an exciting field. And you're about to be a part of it.

What does the course cover?

- **Foundations of Financial Planning**
- **Investments**

Key benefits

Nationally recognised

The units that make up this course are nationally recognised under the Australian Qualifications Framework. You may be able to use them as part of a pathway to higher education at institutions around Australia.

ASIC + RG146 compliant

This course meets the ASIC education requirements known as RG146. These outline the knowledge and skills areas required to deliver both general and personal (Tier 1) financial advice under an Australian Financial Services Licence (AFSL). This course has been approved by ASIC authorised assessors.

Diploma of Financial Planning

Upon completion of the course, you will have achieved 50% of the course requirements to complete your Diploma of Financial Planning. With a few months' more study, you could upgrade to a full Diploma. Transferring your course credits and continuing your study is easy – just get in touch with your dedicated course consultant.

Course modules and units

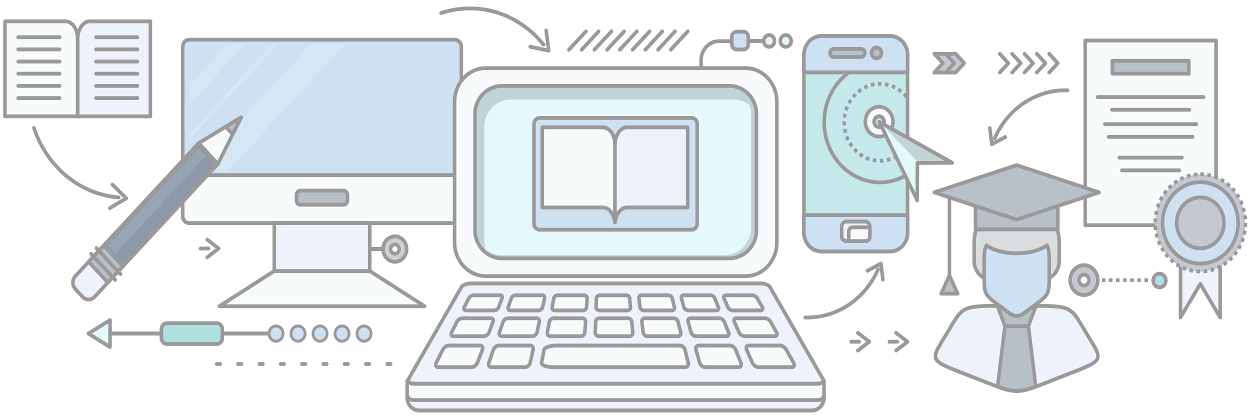
In total, you need to complete 14 nationally recognised units of competency to be awarded the RG146 Compliant Investments course. The units of competency in this course are nationally recognised under the Australian Qualifications Framework (AQF).

Module 1 – Foundations of Financial Planning

- Comply with financial planning practice ethical and operational guidelines and regulations (FNSFPL501)
- Review financial plans and provide ongoing service (FNSFPL505)
- Provide appropriate services, advice and products to clients (FNSIAD501)
- Determine client requirements and expectations (FNSCUS505)
- Record and implement client instructions (FNSCUS506)

Module 2 – Superannuation and Retirement Planning

- Determine client financial requirements and expectations (FNSFPL506)
- Apply principles of professional practice to work in the financial services industry (FNSINC401)
- Develop and use complex spreadsheets (BSBITU402)
- Provide advice in managed investments (FNSASICT503)
- Provide advice in securities (FNSASICW503)
- Provide advice in derivatives (FNSASICV503)
- Analyse financial-market products for clients (FNSFMK502)
- Advise clients on financial risk (FNSFMK503)
- Conduct product research to support recommendations (FNSINC501)



What is the course duration?

Most students complete this course in one year. Your completion time frame depends on your previous education, work experience, time availability and work rate. You're expected to complete at least one module every six months.

What is the course structure?

This course is delivered completely online. This means you'll access your learning and assessment resources using an online portal. You can access this anywhere and anytime.

We consistently receive feedback from our students telling us the course is very well structured and easy to follow. Of course, if you're having trouble wrapping your head around a concept or assessment piece, you can always reach out to your trainer for support.

What are the entry requirements?

There are no formal entry requirements. Just bring your drive, motivation and passion for the industry. That said, if this is your first time studying at this level, we'll need to check your levels of English and maths before you enrol. People with disabilities are encouraged and supported to apply.

Assessments

The experts who design and deliver our courses have developed an assessment framework that's uniquely designed to help you gain a deep understanding of the material. Assessment formats include:

- Case studies
- Multiple-choice questions
- Short-answer questions
- Workplace scenarios
- Projects

Course costs

Monarch's courses are competively priced.

Check our website for the most up-to-date prices at **www.monarch.edu.au/courses** or call us on **1300 738 955.**

Why choose Monarch Institute?

You need a different learning experience. We're ready to deliver.

Expertise

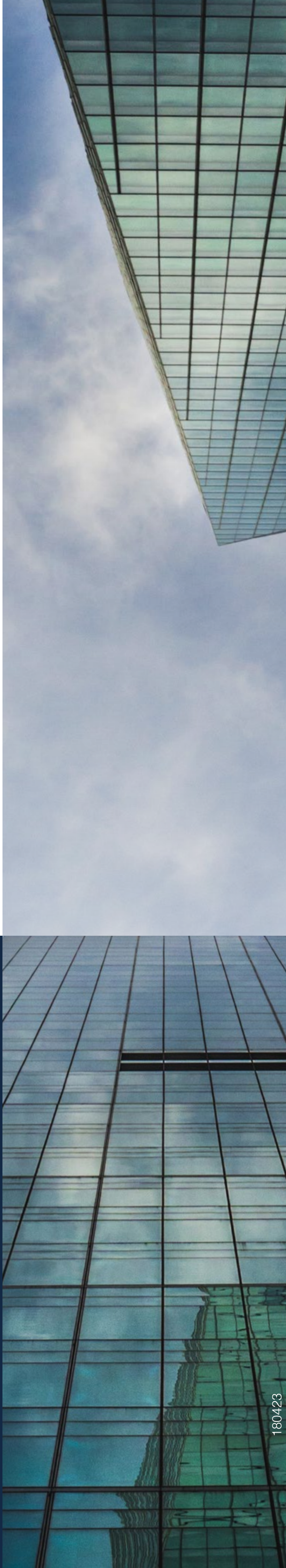
- ✓ Courses developed with leading academics and industry associations
- ✓ Delivered by brilliant trainers who work with corporate leaders
- ✓ Learn from professionals using real world case studies

Flexibility

- ✓ Fit study around work, family, life.
- ✓ Start immediately, or down the track
- ✓ Flexible payment options

Support

- ✓ Dedicated team of trainers and support staff on hand to guide you
- ✓ Up to date, easy to understand course materials
- ✓ Assessment turnaround in 5-7 business days with comprehensive trainer feedback



Enrol today

Commence your RG146 Compliant Investments (Partial completion of FNS50615) with Monarch Institute today to successfully launch your career.

To discuss the course that's right for you call
1300 738 955

To find out more information email
info@monarch.edu.au

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

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