



RG146 Professional Series

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



NATIONALLY RECOGNISED
TRAINING

RTO: 22530

Your key to a bright future in financial services

Whether you are new to financial services, or already working in the industry, this course is designed to open up as many career opportunities as possible. It's practical, real-world education that's been designed with multiple pathways in mind.

Fit your professional development into your busy schedule, confident that you'll be supported by your trainers every step of the way. It's just one part of our commitment in helping you smash your career goals.

What does the course cover?

- **Foundations of Financial Planning**
- **Investments**
- **Superannuation and Retirement Planning**
- **Insurance and Risk Management**

Key benefits

Pathway to entering the financial services industry

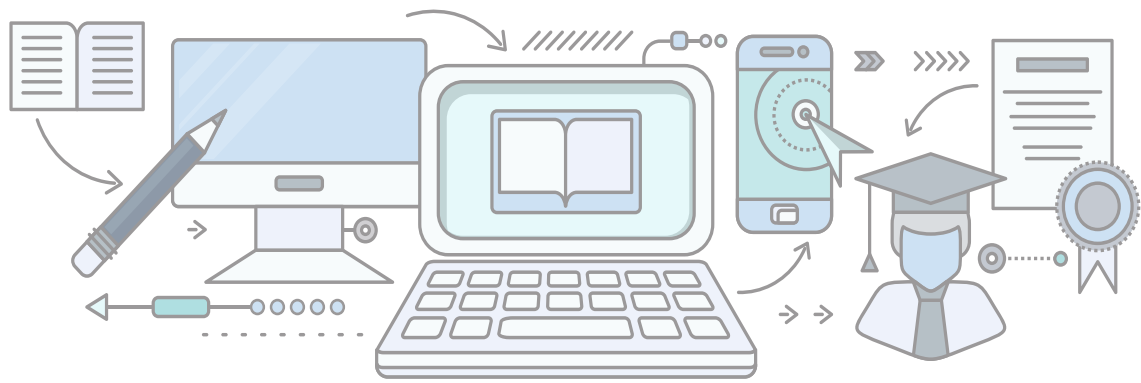
If you're looking to kick off your career in the financial services industry, this course will help you understand what it's all about and what your options are.

Build on your existing skills

This course is great if you're already working in one of these areas and want to further your knowledge.

Bite-sized modules

This course provides an understanding of how the financial services industry works, and defines the line between general advice and specific advice.



Your way, your terms

This course has been specifically developed to be studied online to give you absolute flexibility. You'll get comprehensive support and guidance from your trainers every step of the way.

- Easy-to-follow course materials
- Comprehensive videos
- A dedicated team on hand to guide you
- Unrivalled support from your course trainers
- Online quizzes to test your knowledge
- Access to a student Facebook group

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 is the course duration?

Most students complete this course in 2-6 months. Your completion time frame depends on your previous education, work experience, time availability and work rate.

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.

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.

Course modules

Module 1 / Foundations of Financial Planning

- The Financial Planning Industry
- The Financial Planning process
- The paperwork
- Economic Fundamentals
- Monetary Policy
- Fiscal Policy
- The Economic Cycle
- Key players in the financial marketing arena
- Taxation basics

Module 2 / Investments

- Asset classes
- Cash investments
- Fixed interest investments
- Property investments
- Equities (shares)
- Performance of asset classes
- Dollar cost averaging
- Investment risk
- Diversification
- Exchange traded funds (ETFs)
- Investment selection
- Compound interest & time value of money

Module 3 / Superannuation

- Superannuation landscape
- Types of superannuation funds
- Tax and superannuation
- Superannuation contributions
- More about superannuation contributions
- Accessing your superannuation benefits
- Breaking down the withdrawal benefit
- Income streams and retirement considerations
- Transfer balance caps
- Retirement considerations
- Superannuation death benefits
- Life insurance inside superannuation
- Self-managed superannuation funds

Module 4 / Insurance and Risk Management

- Classification of risk
- How do we handle risk?
- Insurance characteristics
- General insurance
- Personal life insurance
- Structuring life insurance
- Term life insurance
- Total and permanent disability insurance (TPD)
- Income protection insurance
- Trauma insurance
- Insurance premiums



Jobs and career pathways

Financial planning is an industry that's enjoyed unprecedented growth over recent years. When you graduate, you can pursue a variety of career paths.

Key opportunities include:

- Financial Support Officer
- Insurance Officer
- Assistant Paraplanner
- Financial Planning Practice Manager
- Customer Service / Support Officer at a Financial Planning Firm

Where you'll work

There are many workplaces for which RG146 training would add substantial credibility and skill, including:

- Banks
- Investment funds, platform providers, and research houses
- Superannuation funds
- Stock brokers
- Credit unions
- Accounting practices
- Financial planning practices
- Mortgage broking businesses
- Insurance firms
- Business brokerages
- Real estate agencies



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Industry insights



Employment/positions projection

10.7% growth to 2026



Earnings (average full time earnings)

\$2,887 per week



Full time vs part time

83% full time



Flexibility

Work remotely or on the go



Working with people

**Help people protect their families
and achieve their goals**

Industry insights

Take your place in the fastest growing profession in finance

Financial services is an exciting, fast changing industry. It's quietly transforming the futures of millions of Australians. And you're about to be a part of it.

Technology is changing the way clients get advice. There's a trend towards online advice; it's more accessible and affordable for lots of clients.

Your future in financial services starts now. Learn the skills that employees need, and get ready to apply for one of the thousands of job openings in financial services each year. Or take your career to the next level and specialise in a specific type of advice. Whatever path you're on, you'll love where studying with Monarch Institute takes you.

Sources: Labour Marketing Information 2024



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
- ✓ Fast assessment turnaround times with comprehensive trainer feedback

Enrol today

Commence your RG146 Professional Series with Monarch Institute today to take the next step forward in 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

