

une

University of
New England



Approved by the
Financial Adviser
Standards

Study Financial Planning at UNE

- Learn from practising financial advisers
- Ranked Number One Online University
- Advanced standing for graduates of Monarch Institute (or equivalent training organisations*)

* Entry not guaranteed.



Monarch Institute recommends UNE

Your financial planning pathway

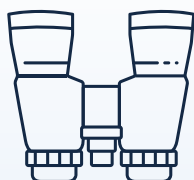
Are you new to the financial planning industry? Or maybe you have already completed a Diploma or Advanced Diploma of Financial Planning. Either way, Monarch Institute recommends the University of New England (UNE) to make it easier for you to take your next step towards a career in financial planning.

Depending on what you've studied and your previous work experience, there are two options. You also may be entitled to receive advanced standing (similar to unit credits). Options include:

- **Option 1 – Bachelor of Commerce (Financial Planning)**
- **Option 2 – Graduate Diploma in Financial Planning**

UNE at a glance

UNE commenced as a University in 1955 making it the ninth oldest of Australia's 40 public universities. UNE has been providing quality distance education for decades and is now recognised and awarded in delivering excellence in online education solutions.



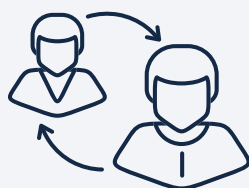
Take Australia's only university-level courses on the critical emerging practice areas such as Aged Care Advice.



Run through every aspect of the client journey in more detail than ever with a financial planning simulation unit.



Receive advanced standing for your previous study and work experience for a certain number of units if offered a place in a UNE course.



Join a community of over 100,000 proud alumni.



UNE ranked Number One in Online Study by Australia's Online University Rankings.



Option to attend a University of New England graduation ceremony (Autumn, Spring or Summer).

Option 1

Bachelor of Commerce (Financial Planning)

The Bachelor of Commerce (Financial Planning) at UNE is designed to give you the real-world skills you'll need to excel as a financial adviser. You'll undertake learning activities that allow you to apply your knowledge in realistic workplace scenarios. This means you'll graduate with skills that show off your critical thinking abilities, helping you stand out from the crowd. Advanced standing (i.e. credits) may be available if you have previous financial services experience and/or qualifications. Depending on your experience and other qualifications, you'll receive advanced standing (i.e. credits) for between 8 and 12 units.

Pathways of Opportunities

What is your highest completed qualification?



Best option

	Bachelor of Commerce	Bachelor of Commerce
Advanced standing	8-12	12
Units to complete	12-16	12
Fee structure	CSP*	CSP*

* The Australian Government subsidises a Commonwealth Supported Place (CSP) by paying part of the fees directly to the university.
Please note: Advanced standing is based on individual applications where experience and qualifications are assessed.

Number of units: 24

Core	+ Electives	
Professional Ethics	Farm and Resource Management	Intergenerational Advice
Issues in Commercial and Financial Services Law	Human Resource Management	Banking and Finance
Behavioural Finance and Investment Portfolio Management	International Political Economy	Social Security Advice
Investment Fundamentals and Financial Advice Principles	Introduction to Financial Accounting	Employment Relations
Superannuation and Retirement Planning Strategies and Advice	Financial Instruments and Markets	Business Statistics
Insurance Advice, Risk Management and Estate Planning	Accounting Information Systems	Introductory Finance
Financial Advice Construction and Client Communication Simulation	Small Business Management	Corporate Finance
Taxation Law for Financial Services	The International Economy	Financial Statement Analysis
Self-Managed Superannuation Funds	Managing People and Organisations	Small Business Finance
Aged Care Advice	Communication for Business	Fraud Prevention and Investigation
	Integrated Marketing Communications	International Financial Management
	Security Analysis and Portfolio Management	Australian Economic Institutions and Performance
	Fundamentals of Marketing	

Am I eligible?

This option is great for **NEW ENTRANTS** into the financial planning industry

OR

You are an **EXISTING ADVISER** that chooses not to undertake a Graduate Diploma in Financial Planning



Option 2

Graduate Diploma in Financial Planning



Refer to definition at www.fas.treasury.gov.au

The Graduate Diploma in Financial Planning is suitable for either existing advisers needing to upskill, or new entrant 'career changers'. It's packed full of advanced-level topics with immediate application for advice professionals.

There are 8 units in this qualification for new entrant career changers, and some existing advisers. However, FASEA have provided guidelines on advanced standing (i.e. credits) available for existing advisers with other qualifications.

Number of units: 8*

Core
Professional Ethics
Issues in Commercial and Financial Services Law
Behavioural Finance and Investment Portfolio Management
Investment Fundamentals and Financial Advice Principles
Superannuation and Retirement Planning Strategies and Advice
Insurance Advice, Risk Management and Estate Planning
Financial Advice Construction and Client Communication Simulation
Taxation Law for Financial Services

* Advanced standing (i.e. credits) may apply

Note : University admission and course rules apply

Am I eligible?

- You are an **EXISTING ADVISER**
- OR**
- You are **NEW ENTRANT (CAREER CHANGER)**



Still not sure?

We get it – the new education compliance requirements can seem complicated. We've got your back. Have a chat to a specialist course consultant at UNE to discuss your options and obligations.



To discuss your unique pathway to university study, call Adrian Shaw (UNE Financial Planning Lecturer)

0402 214 742



For more information or to request a call back, email Adrian Shaw

pathways@monarch.edu.au



University of New England
CRICOS Provider Number 00003G

