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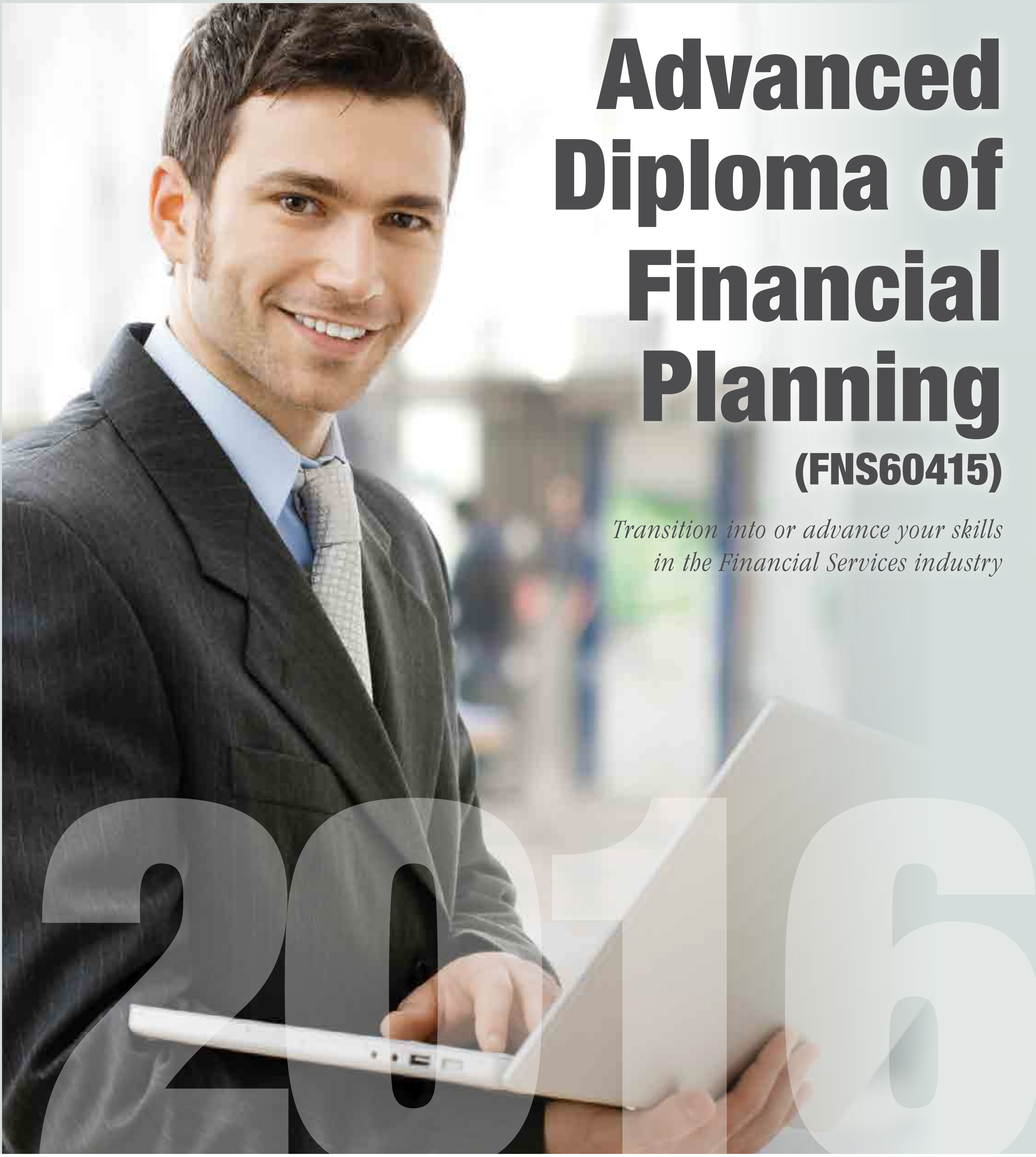
IBI AUSTRALIA

INVESTMENT BANKING INSTITUTE



Advanced Diploma of Financial Planning

(FNS60415)

Transition into or advance your skills in the Financial Services industry

2016

ADVANCED DIPLOMA OF FINANCIAL PLANNING

A career in the financial services offers opportunities for you to enjoy a rewarding career and afford a great lifestyle and all you need to do is study to gain or upgrade your educational qualification.

The IBI Difference

Our Advanced Diploma of Financial Planning (FNS60415) is comprised of 8 core units and 6 electives that can be undertaken by classroom workshop or distance education (self paced):

Distance Learning

This provides you with the flexibility to study where you want, when you want and at a pace that best suits your lifestyle. We have a dedicated Distance Education Team of experienced, industry professionals who provide individually tailored guidance and feedback to ensure each student gains the depth of knowledge and understanding to stay at the leading edge of their profession.

Facilitated Workshops (Classrooms)!

All IBI students are enroled as distance students but have the option of attending classroom workshops. Workshops are facilitated by financial services professionals with years of industry experience. Each workshop is 2-days in duration which covers the key foundation stones of our Advanced Diploma. We conduct a full 8-day Advanced Diploma course (delivered in two blocks of 4 days, two weeks apart) each month in the major capital cities.

Workshops provide the perfect setting for students to gain valuable insight from experienced industry professionals whilst benefiting from the ability to hear the opinions and views of classmates from a variety of backgrounds which forms a critical component of the total learning experience.

Investment Banking Institute delivers uniquely designed courses and programs that aim to provide you with the tools and skills necessary to succeed in the Financial Services industry. IBI's team of industry based professionals provide education that is affordable and flexible and is based on real world practical skills-based outcomes. IBI's flexible and practical teaching methodology delivers job ready knowledge and skills to allow you to secure a place in the workforce. IBI has offices and students throughout Australia. Our workshop classes are conducted by a network of industry professionals.

Why work in the financial services industry?

- The financial services industry is attractive for a number of reasons
- Large variety of job roles
- 3rd largest sector of the Australian economy
- Largest employer
- Safe and enjoyable work environment
- Highest income per person
- Increasing growth prospects

Learning Outcomes

- Gain an improved understanding of the Financial Services sector
- Develop customer services skills

Course Benefits

- Nationally accredited program
- Training over 12 month period and can be completed earlier
- Recognition of Prior Learning (RPL) and Current Competencies
- Flexible study options and talior-made solutions to your training needs
- Unique, real-world training led by industry experts
- Fast track your career

Pre-requisities

Completion of the Diploma of Financial Planning (FNS50615) is a pre-requisite for the Advanced Diploma of Financial Planning (FNS60415)

Course fees

Call IBI for the latest course fees .

For the latest fees:
Visit www.ibi.edu.au
Call 1300 669 786
See our list of course fees.

IBI Quality

Chair of the IBI Academic Board is Professor David James. David is the former Vice Chancellor, University of Ballarat, Deputy Vice-Chancellor of Deakin University and Professor at Bond University

Secure a Career in the Finance Services industry

* This training is provided with a range of payment options. Terms and Conditions apply.

UNITS OF COMPETENCY

The Advanced Diploma of Financial Planning (FNS60415) provides participants with the knowledge to provide a comprehensive range of financial planning services. The Advanced Diploma of Financial Planning (FNS60415) is comprised of 8 core units and 6 elective units.

Core units of competency:

- FNSFPL508A Conduct complex financial planning research
- FNSFPL601A Provide technical and professional guidance
- FNSFPL602A Determine client requirements and expectations for clients with complex needs
- FNSFPL603A Provide comprehensive monitoring and ongoing service
- FNSFPL604A Develop complex and innovative financial planning strategies
- FNSFPL605A Present and negotiate complex and innovative financial plans
- FNSFPL606A Implement complex and innovative financial plan
- FNSPRM601A Establish, supervise and monitor practice systems to conform with legislation and regulations

Elective units of competency:

- FNSPRT402A Prepare a Will
- FNSPRT501A Advise clients on Trust Structures
- FNSPRT502A Advise clients in Estate Planning
- FNSPRT405A Establish powers of attorney
- FNSFLT502B Facilitate customer awareness of the Australian financial system and markets
- FNSFLT505A Facilitate customer or employee understanding of superannuation as an investment tool

Our graduates are industry preferred and job ready

Assessment

The Advanced Diploma of Financial Planning (FNS60415) has been developed to utilise holistic workplace assessment activities. The Australian Quality Training Framework (AQTF) requirements for competency based training and assessment criteria for this course are built into all of our courses.

The assessment methods used during the course will include:

- Multiple Choice Questions (MCQs)
- Problem Solving Scenarios (application of real-world financial planning procedures)
- Case Studies
- Role plays

Please note that the assessment activities are completed outside of the course workshop sessions.

Career Opportunities

Successful completion of this qualification may lead to career opportunities such as:

- Financial Planner
- Estate Planning
- SMSF Planning
- Insurance Officer
- Superannuation Advisor
- Personal Banker
- Recognition of Prior Learning

RPL involves the assessment of previously unrecognised skills and knowledge an individual has achieved outside of the formal education and training system, against the requirements of a qualification.

ASIC Training Register

Advance Diploma is not listed on the Australian Securities & Investments Commission (ASIC) Training Register.

www.asic.gov.au/etraining/etrain.nsf

How do I enrol?

Call our career consultant to tailor your enrolment to suit your needs 1300 669 786

Prior to enrolment please ensure you read & understand the pre-enrolment information and the terms and conditions contained in the Student Information Guide as they relate to your course and confirm that you are proficienct with Microsoft® Office & email software on a personal computer.

Course Duration

Students shall take 15 to 20 hours a week over a 6 to 12 month period to complete a Certificate or Diploma course. During this period students shall be reading, conducting research, performing assessments and managing feedback.

Classroom Workshop attendance is optional but is available to assist in completing assessments, networking & understanding career opportunities.

The study time consists of three elements:

- Reading and simulated study (60%)
- Research (10%)
- Assessments (30%)

A further 6 months of course duration is provided if 50% of the assessments have been completed or hardship circumstances require.

This qualification is delivered to students via Distance Learning.

As a value addition, students may attend optional Face-to-Face classroom workshops which IBI conducts on a periodic basis. IBI Classroom Workshops are designed to provide conceptual clarity of key topics and issues contained in the course content. Workshops are conducted in an environment that promotes discussion and sharing of ideas leading to genuine learning outcomes.

It is expected that participants study and work through their Learning Manuals before attending the workshops, bringing with them the main issues that they would like to discuss.

Students may select from a range of classroom workshops that are scheduled and published on the IBI website. There will be no limit to the number of times a student can attend the same workshop.

Advanced Diploma of Financial Planning (FNS60415) includes the following units of competency:

Sectoral Core Unit of Competency Code (Unit of Competency Name)

FNSFPL508	Conduct complex financial planning research
FNSFPL601	Provide technical and professional guidance
FNSFPL602	Determine client requirements and expectations for clients with complex needs
FNSFPL603	Provide comprehensive monitoring and ongoing service
FNSFPL604	Develop complex and innovative financial planning strategies
FNSFPL605	Present and negotiate complex and innovative financial plans
FNSFPL606	Implement complex and innovative financial plan
FNSPRM601	Establish, supervise and monitor practice systems to conform with legislation and regulations
FNSCUS505	Determine client requirements and expectations
FNSCUS506	Record and implement client instructions
FNSFMK502	Analyse financial market products for client

IBI AUSTRALIA INVESTMENT BANKING INSTITUTE

Develop your skills in the financial planning sector and open opportunities

IBI is part of the Campus Education Group of Companies

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