

Diploma of Financial Planning

(FNS50615)

*Advance your skills in
the Financial Services industry*

2016

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

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.

To view all our courses go to www.ibi.edu.au

Learning outcomes

This course is designed to deliver the following learning outcomes:

- ASIC RG 146 compliance
- Provide ASIC financial advice (both general and personal advice)
- Provide advice in life insurance, managed investments, securities, derivatives and superannuation

Course benefits

- Nationally accredited course
- RG146 Qualification to provide advice
- Recognition of Prior Learning (RPL) and Current Competencies
- Flexible study options and tailor-made solutions to meet your training needs
- Day, evening, weekend and intensive classes
- Unique, real-world training led by industry experts
- Fast track your career.

Course fees

For the latest fees:

Visit www.ibi.edu.au

Call 1300 66 97 86

See our [list of course fees](#).

Student support

IBI provides students with unlimited & free:

- Personal Mentor
- Classroom Workshops
- 1300 Helpline
- E-mail Support Resubmissions
- No Re-sit Fees

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

Our Diploma of Financial Planning course has been developed under the new Australian Qualifications Framework (AQF) (released in 2011). Therefore the course is nationally accredited and industry recognised.

Secure a Career in the financial Services

ASIC Training Register

This Diploma is listed on the Australian Securities & Investments Commission (ASIC) Training Register.

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

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.

Course assessment

The IBI Diploma of Financial Planning (FNS50615) has been developed to utilise holistic workplace assessment activities.

The Australian Skills Quality Authority (ASQA) 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:

- Start your Own Business
- Financial Para-Planner
- Insurance Officer
- Superannuation Advisor
- Personal Banker

Pre-requisites

There are no pre-requisites, however, you should have the ability to pass the Learning Literacy and Numeracy Test (LLN) and have a good understanding of English Language.

Students require access to and an understanding of how to use:

- a Personal Computer with Microsoft Windows (**Mac and Unix are not supported**)
- Internet and email, Microsoft Excel, Powerpoint, Word 2010 and pdf software applications.



IBI Quality

Chair of 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.

IBI is a Registered Training Organisation (RTO #22047) with Australian Skills Quality Authority (ASQA)

How do I enrol?

Call our career consultant to tailor your course to suit your needs 1300 66 97 86

Course delivery & duration

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.

It is expected that on average, students will have the following study load to complete this course:

Study Hours	1505
Weeks	52
Study Hours per Week	29

Students shall take up to 30 hours a week over a 12 month period to complete this Diploma. 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. A further 12 months of course duration is provided if 50% of the assessments have been completed or hardship circumstances require.

Units of competency

Diploma of Financial Planning (FNS50615) has 15 units of competency (9 core units plus 6 elective units) 4 including ASIC requirements, industry electives to enhance work opportunities and industry skills & knowledge demands. Individuals in these roles have autonomy in performing technical operations, apply solutions to a range of often complex problems, and analyse and evaluate information from a variety of sources. They apply initiative to plan, coordinate and evaluate their own work and provide guidance to others.

ASIC Units of Competency Code (Unit of Competency Name)

FNSASICZ503A	Provide advice in Financial Planning
FNSASICX503A	Provide advice in Life Insurance
FNSASICU503*	Provide advice in superannuation
FNSASICX503*	Provide advice in life insurance
FNSASICW503A	Provide advice in Securities
FNSASICV503A	Provide advice in Derivatives
FNSASICT503A	Provide advice in Managed Investments

Prerequisite - Unit of Competency Code (Unit of Competency Name)

FNSFPL501A -	Comply with financial planning practice ethical and operational guidelines and regulatory requirements
FNSFPL502A -	Conduct financial planning analysis and research
FNSFPL503A -	Develop and prepare financial plan
FNSFPL504A -	Implement financial plan
FNSFPL505A -	Review financial plan and provide ongoing service

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

BSBITU402	Develop and use complex spreadsheets
FNSASICZ503*	Provide advice in financial planning
FNSFPL501	Comply with financial planning practice ethical and operational guidelines and regulations
FNSFPL502	Conduct financial planning analysis and research
FNSFPL503	Develop and prepare financial plan
FNSFPL504	Implement financial plan
FNSFPL505	Review financial plans and provide ongoing service
FNSFPL506	Determine client requirements and expectations
FNSINC401	Apply principles of professional practice to work in the financial services industry

*Additional ASIC units have been added to the course & shall be issued as separate SOA



IBI is part of the Campus Education Group of Companies

Develop your skills in the financial services sector and open career opportunities

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