

# Diploma of Financial Planning

**FNS50615**

Advance your career in  
Financial Services Industry





## Overview

This program develops the essential skills and knowledge required to enter the financial planning industry. The course emphasizes on knowledge and financial planning skills to prepare you for providing personal advice to retail clients.

Our course also provides you with the necessary industry specific certification (RG146) to be ASIC compliant.

On completing your FNS50615 Diploma of Financial Planning, you can give advice in various roles within the financial services industry. This course is written by practicing financial planners and is reviewed and is reviewed frequently to keep it up-to-date.

## Course Outcome

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

## Learning Material

We provide you the course material from your online student portal on our website. Should you require the hard copy study materials, additional fees will be incurred.

## Course Outline

It is expected that students will spend 1225 hours in learning and related activities over 12 months. Students who have extensive industry experience will be expected to complete it in a shorter period.

Work in Financial Services

DFP 1 - Financial Planning

DFP 2 - Risk Protection

DFP 3 - Superannuation & Retirement Planning

DFP 4 - Investment Planning

Spreadsheets for Business

Study is self-paced and the program is designed to cater to the needs of students both in the content and the style of delivery to ensure that the participants have ample time to absorb the content and practice their skills.

## Course Fees

For the latest fees:

Visit [www.tabt.edu.au](http://www.tabt.edu.au)

or Call 1300 795 056

See our list of course fees.

## Mode of Delivery

**Distance:** Study from anytime anywhere.

**Classroom:** Attend classes at our training centre and interact face-to-face with trainers and fellow students.



## Course Benefits

This course is flexible saving students time and money. Students are encouraged to continue the course at their own pace without restrictions as to when and how you complete the course. Therefore, students are able to continue their life roles and incorporate their study into time slots that suit their lifestyles.

We provide unlimited student support while you study distance. You can arrange a time with your trainer to speak to you via Phone, Email or Skype anytime that works for you. Students have 12 months in which to complete all of their assessments.

## Career Opportunities

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

- Start your Business as a Financial Planner
- Become an Insurance Officer
- Superannuation Advisor
- Personal Banker
- Work as a Financial Planner

## Completion

Upon successful completion of this course you will be awarded the Dipoma of Financial Planning (FNS50615) qualification by Think Academy of Business & Technology. If a student successfully completes the units of competency, they will receive a Statement of Attainment relating to the units completed.

## Course Entry Requirement

This is an open entry course with no pre-requisite qualifications. However, students should have the following abilities

- Pass the Learning Literacy and Numeracy Test (LLN)
- Have a good understanding of English Language.
- Basic knowledge of using Computers and Microsoft Office.

## Duration

Students have 12 months to complete this qualification. This course is a self-paced distance learning course. We would expect that you will spend at least 24 study hours per week. During this period students shall be reading, conducting research, performing assessments and managing feedback.

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

<b>IN MONTHS</b>	<b>12</b>
<b>IN WEEKS</b>	<b>52</b>
<b>STUDY HOURS</b>	<b>1225</b>
<b>STUDY HOURS PER WEEK</b>	<b>24</b>

To successfully achieve competency in this qualification, students will be required to complete the Assessment Tasks that are specified in their course materials.



## UNITS OF COMPETENCY

Unit Code	Title	Core / Elective
BSBITU402	Develop and use complex spreadsheets	Core
FNSASICZ503	Provide advice in financial planning	Core
FNSFPL501	Comply with financial planning practice ethical and operational guidelines and regulations	Core
FNSFPL502	Conduct financial planning analysis and research	Core
FNSFPL503	Develop and prepare financial plan	Core
FNSFPL504	Implement financial plan	Core
FNSFPL505	Review financial plans and provide ongoing service	Core
FNSFPL506	Determine client financial requirements and expectations	Core
FNSINC401	Apply principles of professional practice to work in the financial services industry	Core
FNSASICX503	Provide advice in Life Insurance	Elective
FNSASICU503	Provide advice in Superannuation	Elective
FNSASICW503	Provide advice in Securities	Elective
FNSASICT503	Provide advice in Managed Investments	Elective
FNSINC501	Conduct product research to support recommendations	Elective
FNSIAD501	Provide appropriate services, advice and products to clients	Elective
FNSCUS505	Determine client requirements and expectations	Elective
FNSCUS506	Record and implement client instructions	Elective
FNSFMK502	Analyse financial market products for client	Elective
FNSFMK503	Advise clients on financial risk	Elective
FNSASIC301	Establish client relationship and analyse needs	Elective
FNSASIC302	Develop, present and negotiate client solutions	Elective



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