Advanced Diploma of Financial Services (Financial Planning)

FNS60404

Course overview

The Advanced Diploma of Financial Services (Financial Planning) or ADFS (FP) is a comprehensive competency based program which further develops a financial adviser's professional skills and knowledge. The course covers taxation planning, estate planning, advanced investment strategy and comprehensive Statement of Advice (incorporating Financial Plan) construction.

➜ Learning outcomes

Upon completion of this course you should be able to:

- ✓ Develop and implement comprehensive taxation planning strategies for a range of personal and business clients
- ✓ Make strategic recommendations and referrals to clients in the area of estate planning
- ✓ Develop and implement comprehensive investment planning strategies based on in-depth research, market analysis and client data
- ✓ Gather and analyse client data to develop, implement and review comprehensive Statements of Advice (incorporating Financial Plan construction) based on the range of financial planning strategies available

➜ Course benefits

- ✓ Self paced/self directed learning available by distance four times per annum
- ✓ Tutorial support available via email
- ✓ Cost effective compared with other industry courses
- ✓ Option to enrol in two modules per term to fast track completion of the Diploma

Delivery method

The ADFS (FP) course is offered via Distance study at a cost of **$545** per module (includes electronic course materials). The following **Add-Ons** are available to enhance Distance study as they increase flexibility and provide additional study assistance if required.

Add-Ons	Description	Cost
Fast-Track	An ideal option for students wanting to finish their self-paced studies quickly	$25
Course Folder (hard copy)	Same content as electronic material, but provided in a hard cover, bound folder	$70

Feedback from participants

'I've enjoyed doing both diplomas. My technical knowledge has vastly improved over the last 2 years.'

'Distance study is well organised and structured.'

Nationally Recognised Training

ThreeSixty Adviser Campus

Course Structure & Assessments

Modules 1–3 must be completed prior to enrolling into Module 4.

Core Modules	Assessments	
	Assignment	Exam
Module 1: Taxation Planning for Financial Advisers	✓	✓
Module 2: Estate Planning Strategy	✓	✓
Module 3: Advanced Investment Analysis and Planning	✓	✓
Module 4: Comprehensive Financial Planning	✓	x

All assessments for ADFS are developed by Adviser Campus and marked by Kaplan. Participants must achieve a minimum pass mark of 70% in each element of the assessment, in order to be found competent for a module.

Units of Competency

The units of competency included in this course are from the Financial Services Training Packages and were ratified by ANTA (Australian National Training Authority) in January 2003.

Units of Competencies
FNSICGEN301B Communicate in the workplace
FNSICGEN302B Use technology in the workplace
FNSICGEN304B Apply health and safety practices in the workplace
FNSICIND401B Apply principles of professional practice to work in the financial services industry
FNSFPLN508B Conduct complex financial planning research
FNSFPLN601B Provide technical and professional guidance
FNSFPLN602B Determine client requirements and expectations for clients with complex needs
FNSFPLN603B Provide comprehensive monitoring and ongoing service
FNSFPLN604B Develop complex and/or innovative financial planning strategies
FNSFPLN605B Present and negotiate complex and/or innovative financial plan to the client
FNSFPLN606B Implement complex and/or innovative financial plan
FNSICCUS602B Implement customer service strategy

CE Points

This course has been accredited for a total of 80 CE points (20 CE points per module) upon completion.

Qualification

Once a participant has successfully completed all assessment components for this course they will be awarded the Advanced Diploma of Financial Services (Financial Planning) in accordance with the rules and regulations of the Australian Qualifications Framework.

Vocational Education and Training Act

All participants in Adviser Campus courses are requested to access and review the relevant Commonwealth, State or Territory legislation and regulatory requirements to ensure they are fully informed of requirements that affect their participation in vocational education and training.

How to enrol

Enrolments open 4 weeks prior to each term commencing. Once enrolments have opened, you can enrol online via **www.threesixty.com.au** (click on Education and Training Services). Confirmation will be emailed upon receipt of your enrolment form.

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For more information

Visit **www.Threesixty.com.au**; contact **adviser_campus@threesixty.com.au**; or call **134 360** (Option 4)