



INTERNATIONAL  
INSTITUTE OF  
TECHNOLOGY

RT0 21421

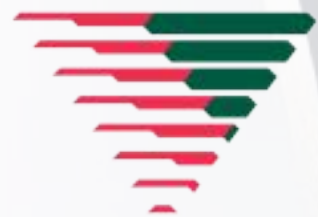
# FNS60920 ADVANCED DIPLOMA OF PARAPLANNING

***MORE INFORMATION  
ABOUT COURSES AND  
HOW TO APPLY:***

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NATIONALLY RECOGNISED  
TRAINING

# FNS60920 Advanced Diploma of Paraplanning

*The FNS60920 Advanced Diploma of Paraplanning enables you to demonstrate expertise in understanding the broad principles of financial planning and provide support to the Financial Adviser. Paraplanners provide a comprehensive range of financial planning services across a variety of product environments, including those involving complex issues and/or requiring innovative strategies.*

*At this level, individuals are expected to apply specialist skills and knowledge in a range of situations to deal with complex situations and issues. They will be expected to work across a broad range of technical or management functions and be accountable for personal outputs and for team outcomes and collaboration.*

*Do you want a competitive advantage over the rest of the industry? The Nationally recognised FNS60920 Advanced Diploma of Paraplanning provides Graduates with broad research skills and tools to be able to work as a Paraplanner or Client Service officer (Financial Planning) or Records Officer within Financial Planning services. You will have access to the Free XPLAN software tools and learning Centre within your enrolment timeframe.*

**ENROL NOW**



**This Course is comprised of the following specialist topics:**



# *FNS60920 Advanced Diploma of Paraplanning*

## Constructing Financial Plans

Provides students with the skills to record and implement client instructions, conduct financial planning research and analysis and understand organisational system compliance, and financial planning legislation and regulations in order to suggest innovative strategies and prepare statements of advice for clients. These skills assist paraplanner's in developing the specialist skills to construct a financial plan.

## Superannuation

Provides students with skills and knowledge required to analyse client needs in regard to superannuation, and prepare advice ethically, professionally and in compliance with industry regulations and codes of practice

## Managed Investments and Securities

Describes the skills and knowledge required to analyse client needs in regard to managed investments; and provide advice ethically, professionally and in compliance with industry regulations and codes of practice.

## Life Insurance

Provides students with the skills and knowledge required to analyse client needs in life insurance; and prepare advice ethically, professionally and in compliance with industry regulations and codes of practice.



# FNS60920 Advanced Diploma of Paraplanning

## Course Overview

*The International Institute of Technology (RTO 21421) provides quality skills-based training courses necessary to kick start your career in the fast-growing financial services industry*

### 01 Course Duration

The duration of the course will vary depending on each individual student and their prior experience and knowledge. 655 hours over a maximum of 24 months is the recommended timeframe for students new to the industry.

### 02 Assessments

True / False Questions (TF), Multiple Choice Questions (MCQ), Short Answer Questions (SAQ), and Case Study Assessment. For more information on assessments Visit: <http://www.iit.edu.au/about>

### 03 Required Resources

Hardware to complete all of the assessments, learners will need a computer/laptop. Software - To complete all of the assessments, learners will need Microsoft Excel 2003 or later, Microsoft Word or later and internet connection.

### 04 Exemptions and Recognition of Prior Learning (RPL)

If you have completed previous studies in the financial services area, you may be eligible for some credits towards the course by way of course exemptions. for more information on course exemptions and recognition of prior learning, Visit: <http://www.iit.edu.au/about>



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### 05 Distance Education

Distance Education is the most flexible of study options as it allows you to study anytime and anywhere. All reading material and assessments are accessed through the Moodle eLearning Platform giving students the flexibility to study while travelling or away from their desktop computers. This option also gives you access to our Distance Education Team, comprised of experienced finance professionals who can discuss concepts and provide feedback on any assessments submitted.

### 06 Minimum Entry Requirements:

The following local entry requirements apply to applicants seeking to enrol in this course: There is no prerequisite to enrol into this qualification. However, it is recommended that you have a level of English equivalent to year 12. Further capability assessments will be determined at the time of pre-enrolment with our Administration staff regarding your level of LLN (Literacy, numeracy and Language) as part of the enrolment process.

### 07 Student Information

Detailed student information is available within our Student Handbook and Schedule of Fees and Charges which is supplied with the enrolment package information and is available on our website. This is important information about your rights and obligations as a student and forms part of our Terms of Service. It is important that when applying for enrolment you make an opportunity to review this information first. If you are not able to locate this information, please contact us and we can send this information to you straight away.



# FNS60920 Advanced Diploma of Paraplanning

## Units of Competency Covered



### Units of Competency

The International Institute of Technology's FNS60920 Advanced Diploma of Paraplanning encompasses the following units of competency:



- > FNSCUS516 Record and implement client instructions
- > FNSFPL614 Develop Financial Plans
- > FNSFPL615 Present and negotiate financial plans
- > FNSFPL621 Comply with ethical and operational guidelines, legislation and regulations in financial planning
- > FNSFPL622 Conduct financial planning analysis and research
- > FNSPRM611 Monitor and review organisational system compliance with legislation and regulations
- > FNSINC411 Conduct work according to professional practices in the financial services Industry
- > FNSINC511 Conduct financial product research to support product recommendations
- > FNSFPL609 Prepare advice in Managed Investments
- > FNSFPL610 Prepare advice in superannuation
- > FNSFPL618 Prepare advice in Securities
- > FNSFPL619 Prepare advice in Life Insurance

### Optional Elective units in SMSF Knowledge

- > FNSSMS511 Invest Self-Managed Superannuation Funds Assets
- > FNSSMS515 Support Trustees in the selecting and monitoring Performance of Outsources Services



The FNS60920 Advanced Diploma of Paraplanning is nationally recognised. For more information please Visit: [www.iit.edu.au](http://www.iit.edu.au)

IIT cannot guarantee completion as this is dependant on successful achievement of competencies or cannot guarantee employment outcome as IIT have no part in the recruitment of external entities.