NATIONALLY RECOGNISED TRAINING

Mentor education
(RTO 21683)

Advanced Diploma of Financial Planning

(FNS60415)

Consolidate your career in financial services with the Advanced Diploma of Financial Planning

Established in 2003, we are Australia's largest privately owned training organisation focused purely on the Financial Services and Business training market. Many of our graduates currently work for Australia's leading financial services institutions (including Big 4 Banks) and small businesses.

"Thank you for the excellent way in which you did the facilitator role. The course documentation is excellent, but you were able to bring to life the underlying meaning of the documents with excellent examples of how the course content is applied in practice.

I think I have taken in and retained more through your careful and thoughtful efforts, which should prove to be of great value to me in the future."

Robert Sterling

Why Mentor Education?

Building on the strong relationships we develop with learners completing our courses, our industry experts are available by arrangement to provide ongoing mentoring on an individual or organisation-wide basis. Learners can also benefit from access to current industry information through our state-of-the-art Continuing Professional Development (CPD) program and Best Practice Review Audits.

Exemplary Student Support...Personalised Constructive Feedback

Mentor Education has gained an enviable reputation as the only financial training organisation that can deliver outstanding RG146 compliance and financial training coupled with personalised student support and customer service.

Our commitment to you

Our commitment is exemplified by the high level of student support received - our industry experts and assessors are available to personally respond to your questions and offer constructive feedback and guidance.

Student Support

To help you thrive and achieve your study goals, expert teacher support is available to you

Unlimited phone support is available Monday to Friday 9am to 5.00pm (AEST)

Unlimited email support, and responded to within two business days

You can get one on-one help from expert tutors via email and you are encouraged to share your work to receive feedback.

Payment Options

Mentor Education has assisted many students from a variety of backgrounds and needs. **Simply speak to your course adviser** for a Payment Option that will work for you.

$77,437

The average minimum salary for Financial Services jobs on SEEK in January 2015

$97,656

The average maximum salary for Financial Services jobs on SEEK in January 2015

Course name	Advanced Diploma of Financial Planning
Course code	FNS60415
Prerequisites	Diploma of Financial Planning
Delivery options	Online Learning or Workshop
Course duration	Up to 12 months
Assessments	Multiple Choice Questions, Written Assignments and Statement of Advice (SoA)
Nationally recognised	Yes

Potential Jobs

- Client Service Officer
- Senior Paraplanner
- Financial Planner
- Paraplanner
- Junior Financial Planner
- Senior Financial Planner

Advanced Diploma of Financial Planning *(FNS60415)*

Nationally Recognised Training

Course Overview

Mentor Education's Advanced Diploma of Financial Planning course is widely regarded as the industry's best practice qualification for professionals seeking to deliver quality advice outcomes to discerning clients with complex needs in the areas of taxation planning, estate planning and advanced investment planning.

Course Entry Requirements

Individuals must have completed the Diploma of Financial Planning (FNS60415) or equivalent to enrol into the Advanced Diploma.

Learners seeking to complete the Advanced Diploma may complete the first three courses in any order, provided that ADFP 4 – Financial Planning is the final subject completed.

Who Should Enrol?

You should enrol if you are:

- Seeking advanced technical and specialist knowledge, tailored to the needs of the financial planning profession in line with industry best practice.
- Interested in upgrading your qualifications to build on your valuable experience in the financial services profession.

Course Outcome

The Advanced Diploma of Financial Planning will equip you with:

- Practical knowledge and technical expertise to meet the objectives of retail clients in the areas of taxation, estate and advanced investment planning.
- Confidence to determine client requirements and expectations for clients with complex needs.
- Framework to conduct advanced financial planning research.
- Skills to develop, present and negotiate holistic financial planning strategies.
- Planning tools required to implement complex and innovative financial plans.
- Best practice processes for providing comprehensive monitoring and ongoing service.

Assessment

We have designed our assessment activities in line with best practice standards to help you deliver quality advice outcomes to your clients.

Each of the first three subjects includes:

- Multiple choice knowledge test.
- Short answer responses to a practical case study.

The final subject requires you to develop and present a complex Financial Plan (SoA).

Course Outline

Code	Unit Title
ADFP 1 - Taxation Planning The first course (ADFP 1) will qualify you to provide personal advice to clients on taxation planning, including Australian Taxation System Income Tax, FBT, PAYG, HEC, Income, CGT, Retirement Planning, Deductions and Personal Tax Planning.	
Part 1	Introduction to Taxation Planning
Part 2	Taxation Calculation and Assessment
Part 3	Intro to Individual Taxation
Part 4	The Treatment of Capital Gains
Part 5	Allowable Deductions
Part 6	Applying the Tax Rates
Part 7	Tax Offsets and Tax Worksheet
Part 8	The Income Tax Collection System
Part 9	Investment Vehicles
Part 10	GST AND FBT
Part 11	Tax Planning
Part 12	Assessable Income
ADFP 2 - Estate Planning The second course (ADFP 2) will qualify you to provide personal advice to clients on estate planning, succession planning and key man insurance.	
Part 1	Introduction to Estate Planning
Part 2	Wills and Probate
Part 3	Intestacey
Part 4	Revoking Wills and Challenging Wills
Part 5	Enduring Power of Attorney
Part 6	Capital Gains Tax
Part 7	Personally Held Assets
Part 8	Assets Held by Trusts
Part 9	Taxation of Trust Income
Part 10	Taxation Responsibilities of an Executor
Part 11	Superannuation and Estate Planning
Part 12	Social Security and Estate Planning
Part 13	Business Succession Planning

ADFP 3 - Advanced Investment Planning

The third course (ADFP 3) enables you to provide personal advice in relation to portfolio construction, risk and return, diversification, investment styles, research and disclosure.

Part 1	Introduction to Financial Maths
Part 2	Using a Financial Calculator
Part 3	Introduction to Risk and Return
Part 4	Portfolio Diversification
Part 5	Market Timing
Part 6	Market Risk and Return
Part 7	Investment Fund Performance
Part 8	Efficient Market Theory
Part 9	Introduction to Behavioural Finance
Part 10	Use of Leverage
Part 11	Handling Foreign Exchange Exposure
Part 12	Research Issues

ADFP 4 - Financial Planning

Successful completion of the final course (ADFP 4) will qualify you to conduct comprehensive financial planning research, determine solutions to complex client needs, implement and monitor innovative financial plans.

Part 1	Legal and Other Requirements for Producing a Statement of Advice
Part 2	The Fact Finding Interview
Part 3	Formatting the Plan
Part 4	Making Product Recommendations
Part 5	Writing the Statement of Advice
Part 6	Presenting & Reviewing the SoA
Part 7	Case Study

CPD Points Earned

52

Course Competencies

Core Units

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 plans
FNSPRM601	Establish, supervise and monitor practice systems to conform with legislation and regulations

Elective Units

FNSASICT503	Provide advice in Managed Investments*
FNSASICW503	Provide advice in Securities*
FNSASICU503	Provide advice in Superannuation*

* Mutual Recognition awarded where completed as part of Diploma of Financial Planning FNS50615 (or equivalent).

Study Options

Online Learning

Study online at your own pace, gives you the flexibility to achieve a nationally recognised qualification whilst also fulfilling your other life commitments.

Unlimited e-mail and phone support is provided by our experienced student support team between Monday to Friday, 9am – 5pm, so you're never left to feel 'lost'or stuck during your studies.

Face-to-face Instructor-led Classroom

Face-to-face class-room workshop is the fastest way to achieve your RG146 or similar qualification. Conducted either face to face or via video conference and facilitated by industry professionals skilled at making the workshop experience interactive, incorporating real life examples of today's market place.

How to Enrol

Student Enrolment Forms can be obtained via the following methods:

1300 306 146 (option 1 'new enquires')	learn@mentor.edu.au
+61 3 8317 2953 (International)	www.mentor.edu.au

To enrol, complete the Student Enrolment Form and scan/email to learn@mentor.edu.au

FURTHER INFORMATION

Web
www.mentor.edu.au

Mail
Mentor Education
1a Scotia Gr, South Yarra
Melbourne Vic 3141

Phone
Aust: 1300 306 146
Int: +61 3 8317 2900

Fax
1300 366 170

Email
learn@mentor.edu.au

Our friendly student support

Mentor education