Financial Planning Aged Care and Disability Short Course

Course Overview

ADCSA
AGED & DISABILITY CARE SPECIALIST ADVISER™

Mentor education

RTO 21683

www.mentor.edu.au

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Why Mentor Education

www.mentor.edu.au

> “I was extremely impressed with the quality of the training that you delivered ”
>
> **Tony Read - Mentor Education Diploma Graduate**

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

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

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

Phone Support
Available

1300 306 146 **+61 3 8317 2953**
Monday to Friday 9am to 5.00pm (AEST)

Email Support
Response 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.

Course name	Financial Planning Aged and Disability Care Short Course
Delivery options	Online Learning
Skill Set duration	Up to 6 months
Assessments	Are a combination of multiple choice and case study/scenario responses

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Course Overview

With the changing age demographic of the Australian population the need for financial planning for older people has become more critical. This course explores key drivers of aged care financial advice in Australia.

The course focuses on the knowledge and capabilities required of a financial planner to provide competent advice in the growing and changing aged care market. Students will examine asset planning with a variety of time frames and life conditions. A significant component of the unit deals with the concepts of behavioural investment through an examination of emotional investing, a significant factor in financial planning for older clients.

At the completion of this course you will be able to:

- Understand the demographic trends and public policy framework facing retirees in the later stages of retirement who need to access aged care services
- Describe and calculate the range of fees and calculation methods for home care packages and residential aged care and the interrelationship between government and private funding
- Understand and critically assess strategy solutions to manage the cash flow and estate planning objectives of clients moving into aged care
- Be aware of the emotional biases which may influence family outcomes and decisions and develop tactics to manage these issue
- Develop and communicate effective client value propositions to demonstrate the value to clients of undertaking planning processes when considering aged care services

Entry requirements

This is an open entry course with no pre-requisite qualifications. In order for you to successfully complete this course, it is recommended that you have a strong literacy and numeracy skills.

Who Should Enrol?

This course is designed for individuals seeking specialised financial knowledge associated with Aged and Disability Care.

Course Outcomes

Students who successfully complete the course can achieve industry accreditation as an Aged and Disability Care Specialist Adviser.

Assessment

Assessment tasks are a combination of:

• Multiple Choice Questions
• Case study and scenario responses

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Study options

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Online learning

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

Unlimited e-mail and phone support

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.

How to Enrol

To enrol, you can complete one of the following options:

Visit https://enrolments.mentor.edu.au/enrol-selfserve and complete the online enrolment form

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

Call 1300 306 146 (option 1 'new enquires ') or +61 3 8317 2953 (for International students)

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