Mentor education

(RTO 21683)

General Insurance Adviser

Regulatory Guide 146 (RG146) Short Course for Financial Product Advisers

Investment Adviser is designed for individuals who require authorisation by an Australian Financial Services License (AFSL) holder to provide advice on regulated Managed Investments or Securities.

"I was extremely impressed with the quality of the training that you delivered"

Tony Read

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.

$77,656

Compiled from Adzuna's index of over 130,000 Insurance Broker job listings in Australia (November 2015)

Course name	General Insurance Adviser
Delivery options	Online Learning or Workshop
Course duration	Up to 12 months
Assessments	Multiple Choice Questions, Short answer responses to a practical case study.
Nationally recognised unit of competencies	Yes

Potential Jobs

- General Insurance Broker
- General Insurance Adviser

General Insurance Adviser

Course Overview

This General Insurance course is designed for individuals wh require authorisation by an Australian Financial Services License (AFSL) holder to provide advice on General Insurance products.

Course Entry Requirements

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

Who Should Enrol?

You should enrol if you are:

- Individuals seeking employment with any general insurance company
- Individuals engaged in the promotion of general insurance products

Course Outcome

The general insurance advice course will equip you with the specialist knowledge and technical skills to provide compliant advice to clients on:

Personal insurance related to:

- House and contents,
- Motor vehicle
- Caravan
- Boat
- Travel and
- Consumer credit

Business insurance related to:

- Sickness and accident
- Liability
- Personal indemnity and
- Workers compensation

General Advice

All financial product advice are labelled under two types of advice: **general advice** or **personal advice.** ASIC has provided guidance as to the difference between general advice and personal advice. Both general advice and private advice are outlined under section 766B of the Corporations Act (http://www.austlii.edu.au/au/legis/cth/consol_act/ca2001172/s766b.html).

Mentor Education's RG146 General Insurance Short Course covers **general advice** only, **personal advice** is not covered.

General Advice

General Advice relates to financial products or investments that can be obtained from an individual that holds an Australian Financial Services Licence (AFSL) or similarly works for a company that has an AFSL.

The advice is classified as general information provided to a client on a particular product or strategy but does not take into account the clients' personal financial circumstances.

Furthermore, for general advice the individual will receive a current Financial Services Guide (FSG) from their adviser at the first meeting and if a product is discussed, a Product Disclosure Statement (PDS) for each product will be provided if strategies are discussed, and a relevant client fact sheets will also be provided.

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Course Outline

Individuals seeking to provide Tier 2 compliant advice on General Insurance products are required to successfully complete the Insurance course as General Advice.

DFP 1 - Financial Advice

Australian Industry Essentials and Fundamentals of Financial Advice must be the first subject completed before any of the specialist knowledge subject(s).

Australian Industry Essentials

Part 1	Australian Economy
Part 2	Australian Financial Markets
Part 3	Investment Funds
Part 4	Corporations Act
Part 5	Regulatory Environment
Part 6	Licensees & Representatives
Part 7	Ethics

General Insurance Specialist Knowledge

Core Area

Part 1	Personal Insurance
Part 2	Understanding Insurance
Part 3	Operation of Insurance Markets
Part 4	General Insurance
Part 5	Advisory Functions
Part 6	Legal Obligations and Compliance
Part 7	Core Insurance Appendix

Specialist Area	
Part 8	The General Insurance Industry
Part 9	Risk and General Insurance
Part 10	The Law Relating to G.I. Payments
Part 11	Reading Product Disclosure Statements
Part 12	Personal Insurance
Part 13	Business Insurance
Part 14	Taxation and Client Relationship Issues
Part 15	Function and Regulation of General Insurers
Part 16	The Contractual Relationship
Part 17	General Insurance Claims

Assessment

This course is assessed via completion of:

- Multiple choice knowledge test for each part.
- Short answer responses to questions relating to a case study, where you are required to apply the financial advice process.

Course Competencies

General Advice

FNSASIC304 Provide Tier 2 general advice in general insurance

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

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Email
learn@mentor.edu.au

Our friendly student support

Mentor education