The Advanced Diploma of Financial Planning provides you with in-depth technical knowledge and skills that will enhance your career prospects. This qualification is a requirement for Senior and Advanced Financial Planner/Adviser roles and offers an optional pathway to RG146 SMSF compliance.

What you will learn

- Establish, supervise & monitor practice systems to conform with legislation & regs
- Determine client requirements and expectations for clients with complex needs
- Conduct complex financial planning research
- Develop complex and innovative financial planning strategies
- Develop, present & implement complex and innovative financial plan

Elective streams

To attain the Advanced Diploma you are required to complete an elective stream of either Self-managed Superannuation Funds (SMSF) (Stream 1) or Practice Management (Stream 2), depending on your professional requirements.

Australia’s leading RG146 training academy

Integrity Education is one of Australia’s leading RG146 training providers for individuals, businesses, and Corporate clients. Our team of experienced industry practitioners have a proven track record of success in designing and delivering Government funded, nationally recognised qualifications.

Government funding available for eligible individuals

Funding guidelines mean that people of any age can now access a Government funded* training place in qualifications at a higher level than they have already completed. Please contact us on 1300 400 346 to find out if you are eligible.

Delivery mode & duration

Online, Distance or Workshop: Approximately 6–12 months depending on student requirements, levels of experience and competence.

Workshops: Midweek & Saturday options available.

Assessment

- Written assessment tasks (multiple choice & short answer questions)
- Case studies
- Workplace simulation/role plays

All assessments are completed on an ongoing basis over the duration of the course.

Entry requirements

The entry requirement for this qualification is completion of the (FNS50611) Diploma of Financial Planning. Furthermore, it is recommended that participants have ACSF level 4 language, literacy and numeracy (LLN) skills to undertake this course. This will be reflected in the LLN Assessment they complete with their application form.

For fee information, please visit www.integrity.edu.au.
Course subjects
To attain the Advanced Diploma, students are required to complete subjects in the knowledge areas of taxation, estate planning, statement of advice construction and one elective stream (self-managed superannuation funds or practice management).

Units of competency
The FNS60410 Advanced Diploma of Financial Planning includes 8 core units and a selection of elective units based on ‘streams’ (the units of competency are designed to meet industry and regulatory requirements regarding the provision of comprehensive financial planning services relating to various complex issues and/or innovative strategies and products).

CORE UNITS
- FNSFPL508A Conduct complex financial planning research
- FNSFPL601A Provide technical and professional guidance
- FNSFPL602A Determine client requirements and expectations for clients with complex needs
- FNSFPL603A Provide comprehensive monitoring and ongoing service
- FNSFPL604A Develop complex and innovative financial planning strategies
- FNSFPL605A Present and negotiate complex and innovative financial plans
- FNSFPL606A Implement complex and innovative financial plan
- FNSPRM601A Establish, supervise & monitor practice systems to conform with legislation & regulations

ELECTIVE UNITS
Stream 1
- FNSSMS501A Invest self-managed superannuation funds assets
- FNSSMS505A Support trustee in the selection & performance monitoring of outsourced services
- FNSSMS601A Provide advice in self-managed superannuation funds
- FNSSMS602A Apply taxation requirements when advising in self-managed superannuation funds
- FNSSMS603A Apply legislative & operational requirements to advising in self-managed superannuation funds

Stream 2
- FNSPRM602A Improve the practice
- FNSPRM603A Grow the practice
- BSBMGT617A Develop and implement a business plan
- FNSORG507A Manage Client Service and business information

Credit Transfer and RPL offered: Recognition of prior learning and skills assessment.

Pathways
The Diploma of Financial Planning (FNS50611) is an entry requirement for this qualification. The Advanced Diploma of Financial Planning meets the ASIC licensing framework and is an industry requirement for employment as a Senior (Advanced) Financial Planner/Adviser providing innovative advice in relation to complex financial planning strategies, products and services. This qualification may articulate in to university programs and may provide credits towards completion of a degree level qualification.

Corporate offers
Please contact our office on 1300 400 346 or info@integrity.edu.au to discuss preferential arrangements for candidates referred from financial institutions which include, but is not limited to, AMP FP / Horizons Academy, BT, Macquarie, SuperPartners, ANZ, CBA, Westpac, and NAB.

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