



IBI

AUSTRALIA

Investment Banking Institute

Self Managed Superannuation Fund Course

**SKILLS VICTORIA
FUNDING NOW
AVAILABLE!**

Enrol today in our Self Managed Super Fund Course today for only \$650*.

**ENROL TODAY!
\$650***

Is a SMSF right for you?

* Offer only available to students eligible for government subsidies. Limited offer. Terms and conditions apply.

Investment Banking Institute

Take your Career to the next level!

The Investment Banking Institute is an official supplier of financial education in Australia.

Our mission is simple:

Help you take control and manage your career aspirations.

Our Self Managed Superannuation Fund course is a nationally recognised qualification that complies with Australian Securities and Investment Commission's (ASIC) Regulatory Guide 146 (RG146) training policy.

Our SMSF course surpasses the highest industry standards and is listed on the ASIC Training Register.

Our SMSF course is a skills-based training program designed to engage and challenge you and deliver the necessary skills to apply the knowledge gained in a workplace environment.

The SMSF course is designed specifically for individuals, including:

- New Entrants to the financial services industry – from school leavers through to individuals looking for a career change;
- People seeking to become a Para-planner and/or Financial Adviser; and
- People seeking a pathway to higher qualifications in order to fast-track their career.
- Those seeking to make an informed decision about their superannuation retirement.

Why choose the Investment Banking Institute of Australia?

The Investment Banking Institute is authentic to the financial education and training as well as being supported by our global alliance partners. Highly regarded by leading financial institutions, practitioners and academics due to our value adding support services. Our aim is to surpass your expectations in attaining the right qualification, in the right career at an equitable price. Whilst learning at a pace that suits your lifestyle demands.

Investment Banking Institute courses are the most up to date, innovative and comprehensive in the Australian market.

The IBI difference...

Flexible, Self-paced Learning

Our Self Managed Superannuation Fund course is comprised of four individual courses that can be undertaken via:

1. Distance Learning

This provides you with the flexibility to study where you want, when you want and at a pace that best suits your lifestyle. We have a dedicated Distance Education Team of experienced, industry professionals who provide individually tailored guidance and feedback to ensure each student gains the depth of knowledge and understanding to stay at the leading edge of their profession.

2. Facilitated Workshops (Classrooms) – only 2 Days or 4 evenings in total!

Workshops are facilitated by financial services professionals with years of industry experience.

Workshops provide the perfect setting for students to gain valuable insight from experienced industry professionals whilst benefiting from the ability to hear the opinions and views of classmates from a variety of backgrounds which forms a critical component of the total learning experience.

Places are limited so it's important to book your place now!

3. Recognition of Prior Learning (RPL)

Recognition of Prior Learning allows students to gain exemptions from our SMSF course for relevant courses or qualifications previously undertaken where the skills and knowledge learned can be verified and assessed. To see if you can benefit from RPL please contact our office and speak to one of our experienced RPL Assessors.

Experienced Industry Practitioners with 'Real World' experience

IBI Facilitators and Assessors have an enormous wealth of industry experience in financial services, education and training, and investment banking. Our staff are highly professional and willing to help above and beyond merely providing educational support – you can chat with them about careers in the industry, industry developments, further study opportunities, and your options once you have completed your studies.

Superior Study Support Services

Our Distance Learning students have immediate and unlimited access via telephone or email to our Distance Education Team from 8am to 6pm, every weekday. We recognise how important it is to provide timely feedback on assessments, enquiries, and distance learning queries.

Our Distance Education Team replies to all queries within 24 hours and provides feedback on assessments within 48 hours.

IBI is committed to providing quality support services for students including:

- Distance Education Team to assist with enquiries about course content, study choices, assessments and industry issues;
- Regular Student Newsletters;
- Subject Matter Experts to provide knowledge beyond the course content materials; and
- Online Learning Resources.

Practical, skills-based Learning and Assessment

IBI's philosophy of learning is one which values the ability by students to use the skills and knowledge gained and apply them in the workplace immediately. This contrasts to the traditional, old university-style 'theoretical' approach to learning which provides no basis for real-world application.

We do not believe in closed-book exams! These merely test a student's ability to retain facts over the short term.

Our approach is one of continual, ongoing assessment using a variety of methods that enables students to demonstrate the required competencies through a broad range of demonstrations such as:

1. Multiple Choice Questions (MCQs)
2. Problem Solving Scenarios (application of real-world financial planning procedures)
3. Case Studies
4. Role plays

Workshop students conduct assessments with the helpful guidance of an experienced Facilitator when queries are raised. Distance Learning students complete their assessments via email and/or over the phone with ongoing feedback and support from the Distance Education Team.

How do I enrol?

Call to discuss your options and tailor your enrolment to suit your needs 1300 669 786. Alternatively, complete the Student Enrolment Form and fax it to us on (03) 9813 2298.

Skills Victoria Funding

Pay only \$650 for the entire course if you qualify for Skills Victoria funding. To qualify you need to:

1. Be an Australian Citizen or Permanent Resident;
2. Not hold an equivalent or higher education; and
3. Be 16 years of age, or older.

Is a SMSF right for you?

Make an informed decision

Starting your own Self Managed Superannuation Fund has many benefits and issues to consider.

Our SMSF course helps you answer these questions.

Learn how to own and operate your own SMSF fund as well as how to help others.

The SMSF industry has enjoyed enormous growth with over 440,000 SMSF now in existence in Australia.

Learn the benefits and value add provide by a SMSF. Due to the flexibility, control and many taxation advantages SMSFs will continue to grow and be used to maximum retirement wealth.

Why you should do this SMSF Program

The SMSF Advisor is designed for participants that wish to met all ASIC RG146 specialist knowledge and skill requirements relevant to the provision of financial planing & superannuation advice.

Students successfully completing this SMSF Advisor program shall learn

- What type of person should establish a SMSF
- Benefits of a SMSF
- Issues to consider before starting a SMSF
- Common mistakes
- SMSF operations & administration
- SMSF Trustee obligations
- SMSF Contributions
- SMSF Investment restrictions
- SMSF Taxation
- SMSF borrowing arrangements;
- Advanced SMSF strategies
 - Property development
 - Investing in private companies
 - Buying holiday investment properties
- Borrowing, security & property fundamentals
- Providing financial advice

To qualify for Government Assistance you need to meet the Skills Victoria funding criteria of being an Australian Citizen or Permanent Resident and not hold a Qualification of Diploma level or higher. For those who qualify, the price is only \$650.

People who do not meet Skills Victoria funding do not miss out. IBI is offering Full Fee students the ability to get their SMSF valued at more than \$4,000 for only \$1,699 by completing the course by distance. There are no more fees to pay

Professional & Industry recognition

The IBI SMSF course delivers a national recognised professional qualification.

Students successfully completing the course shall achieve:

- ASIC recognition
- Regulatory Guide 146 compliant
- Authorised representative with an AFSL holder
- Nationally Accredited Qualifications (Advanced Diploma of Financial Services)
- Specialist knowledge & advisory skills in financial planning & superannuation for delivering
 - general advice on superannuation products; &
 - personal advice on superannuation products that is delivered by financial planners"

Our SMSF course is comprised of the following modules

Module 1 Case Study – Is a SMSF right for you?

Module 2 Introduction to SMSF

Module 3 SMSF Administration & Operations

Module 4 SMSF Sources of Compliance

Module 5 SMSF Contributions

Module 6 SMSF Taxation

Module 7 SMSF Withdrawals

Module 8 Borrowing Fundamentals

Module 9 Property Fundamentals

Module 10 SMSF Security Fundamentals

Module 11 SMSF Commercial Property acquisition

Module 12 SMSF Borrowing & Investing in Shares

Module 13 SMSF Borrowing & Investing in Property

Module 14 SMSF Borrowing Advice – Case Study

Investment Banking Institute is the leading financial, business, corporate finance and investment banking advisory training provider in Australia. All course materials are written in plain English and contain practical real world applications so that your knowledge and skills are enhanced.

The IBI Difference

All IBI Courses have a practical and transactional focus rather than a theoretical academic orientation. These skills are underpinned with the foundation stones to allow students to practice in the industry. Realistic case studies and carefully selected reading materials have direct practical application to the real world requirements. The course text remains succinct so as to highlight the core foundations of the course and retain clarity of thought.

IBI also integrates course and assessment materials into other advisory areas such as corporate finance and investment banking.

Course Code **Nationally Accredited Courses**

FNS50807	Diploma Of Financial Services (Financial Planning)
FNS50107	Diploma Of Financial Services
FNS60404	Advanced Diploma of Financial Services (Financial Planning)
FNS60104	Advanced Diploma of Financial Services
BSB51607	Diploma of Quality Auditing
FNS40107	Certificate IV in Financial Services
FNS40207	Certificate IV in Financial Services (Bookkeeping)
FNS40804	Certificate IV in Financial Services (Finance/Mortgage Broking)
BSB30307	Certificate III in Micro Business Operation
BSB40407	Certificate IV in Small Business Management
BSB41207	Certificate IV of Legal Services
FNS10104	Certificate I in Financial Services
FNS20104	Certificate II in Financial Services
FNS30107	Certificate III in Financial Services
BSB10107	Certificate I in Business
BSB20107	Certificate II in Business
BSB40607	Certificate IV Business Sales
BSB40507	Certificate IV Business Administration
BSB40807	Certificate IV Frontline Management
	Self Managed Super Fund Advisor Course

Professional Programs

Corporate Finance
Investment Banking
ASX Public Listings



MELBOURNE CAMPUS

Melbourne VIC 3000
Tel: 1300 669 786

GEELONG CAMPUS

60 Little Ryrie Street. Geelong VIC 3220
Tel: 03 5222 3058

www.ibi.edu.au