



# Investment Banking Institute

Diploma of Financial Services  
(Financial Planning) (FNS50804)

## SKILLS VICTORIA FUNDING NOW AVAILABLE!

Enrol today in our Diploma of Financial Services (Financial Planning) or Advanced Diploma of Financial Services (Financial Planning) to commence or upgrade your skills for only \$825\*.

**APPLY TODAY!**  
Courses From  
**\$825\***

\* 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 Diploma of Financial Services (Financial Planning) is a nationally recognised qualification that complies with Australian Securities and Investment Commission's (ASIC) Regulatory Guide 146 (RG146) training policy.

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

Our Diploma 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 Diploma 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.

## 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 Diploma of Financial Services (Financial Planning) 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)!

Workshops are facilitated by financial services professionals with years of industry experience. Each workshop is available as day or evening classes or via distance education.

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 Diploma 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.

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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.

## What will I achieve?

Successful completion of all four course that comprise the Diploma of Financial Services (Financial Planning) provides you with the competency to provide personal and general advice as detailed in ASIC (Tier 1) RG146 in the specialist knowledge areas of:

- Financial planning,
- Risk Management (life insurance),
- Securities,
- Managed investments,
- Derivatives, and
- Superannuation.

## 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 back to us.

## Skills Victoria Funding

Pay only \$825 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.

## Course Investment Schedule

Course Name and Topics Covered	Individual Course Investment		Full DIPLOMA Enrolment			
	Distance	Classroom	Distance*	Classroom^		
<b>Financial Advice (DFS 1)</b> <ul style="list-style-type: none"> <li>• Financial Planning</li> <li>• Regulations in the Financial Services Industry</li> <li>• Australian Economic Environment</li> <li>• Financial Advice Process in Practice</li> <li>• Financial Planning Skills</li> </ul>	\$499	\$999				
<b>Risk Management (DFS 2)</b> <ul style="list-style-type: none"> <li>• Risk Management (Insurance) Industry</li> <li>• Personal Insurance</li> <li>• General Insurance</li> <li>• Presenting Insurance Advice</li> </ul>	\$499	\$999				
<b>Investments (DFS 3)</b> <ul style="list-style-type: none"> <li>• Understanding Finance Calculations</li> <li>• Securities</li> <li>• Managed Investments</li> <li>• Derivatives</li> <li>• Investment Advice</li> </ul>	\$499	\$999			\$1,996	\$3,996
<b>Superannuation (DFS 4)</b> <ul style="list-style-type: none"> <li>• Superannuation Environment and the Financial Planning Process</li> <li>• Contributions &amp; Accumulation</li> <li>• Benefit Payments</li> <li>• Superannuation Payment Rules</li> <li>• Death Benefit Eligible Termination Payments</li> <li>• Self-managed super fund</li> <li>• Social Security</li> </ul>	\$499	\$999				

\* Conditions Apply. ^ Day or evening classes available.

**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



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Tel: 1300 669 786

### GEELONG CAMPUS

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