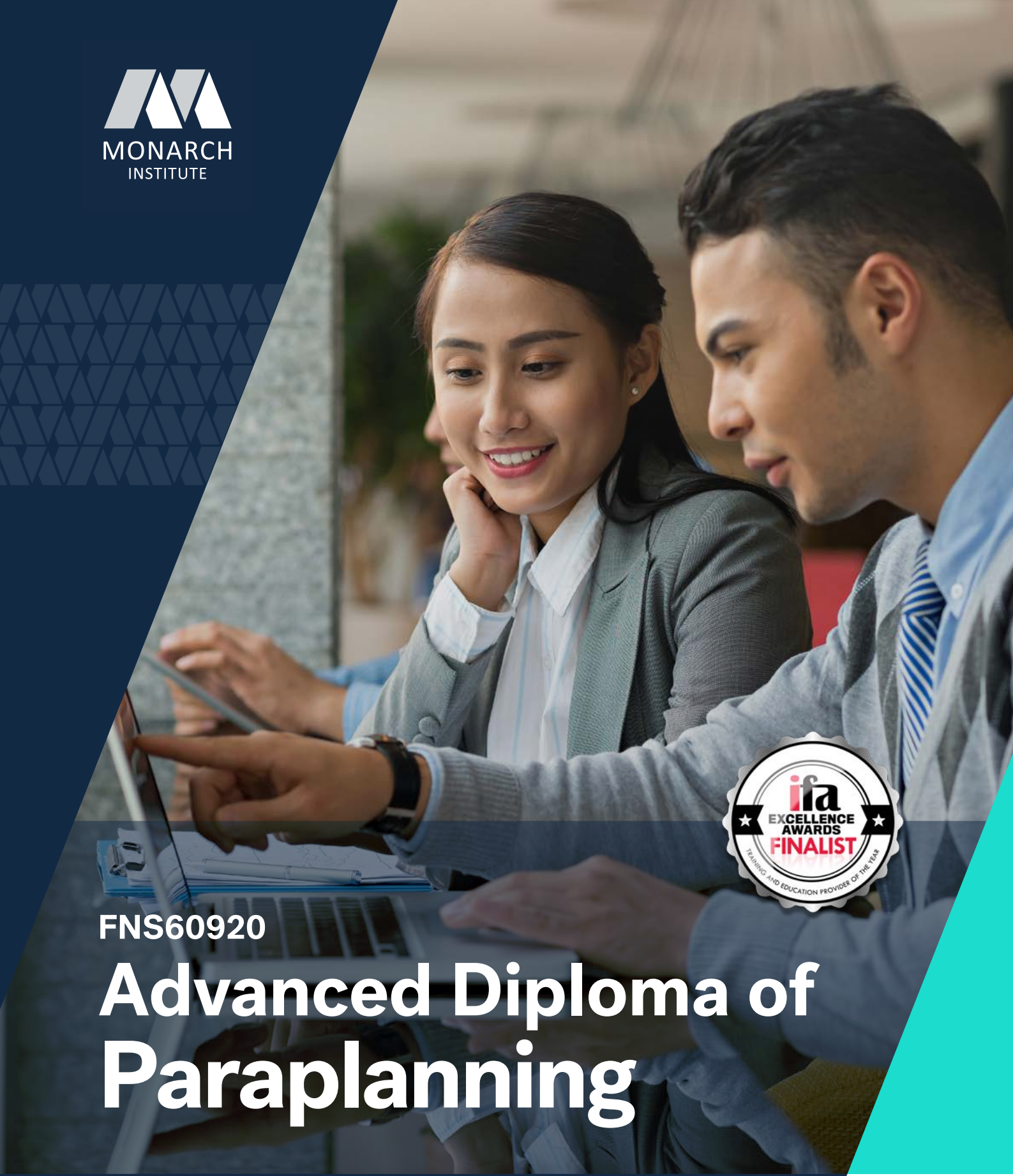
MONARCH
INSTITUTE



FNS60920

Advanced Diploma of Paraplanning

- Understand how to provide a range of financial planning services
- Practical learning delivered in a simulated workplace environment
- Crafted from the ground up by seasoned paraplanners and finance pros

NATIONALLY RECOGNISED TRAINING

RTO: 22530

Skills that can lead to your next career

Behind every great financial planner, there's a hard-working paraplanner. Paraplanners are the backbone of any financial advice practice, putting in the hard yards to research products and match clients with the right solutions. It's a great career for anyone who wants the satisfaction of helping people.

Paraplanning was once a stopover to a career as a financial planner - but not any more. The industry is undergoing massive changes, and one of those changes is the professionalisation of paraplanning. With the new Advanced Diploma of Paraplanning, you can show employers that you're serious about your career. Whether you've worked in admin or paraplanning for years, or you're brand new to this field, you'll finish your Advanced Diploma with new skills you can take into the workplace right away.

What does the course cover?

- **Compliance and regulations**
- **Financial planning research and analysis**
- **Investments, superannuation and life insurance**
- **Managing financial plans**

Key benefits

Built by Monarch

This course was built entirely by Monarch's in-house paraplanning and finance pros, so you know it's quality. It is purpose designed to fit the needs of industry stakeholders looking for highly skilled paraplanners with the technical ability and transferable skills to take on a challenging role within a practice team.

100% digital

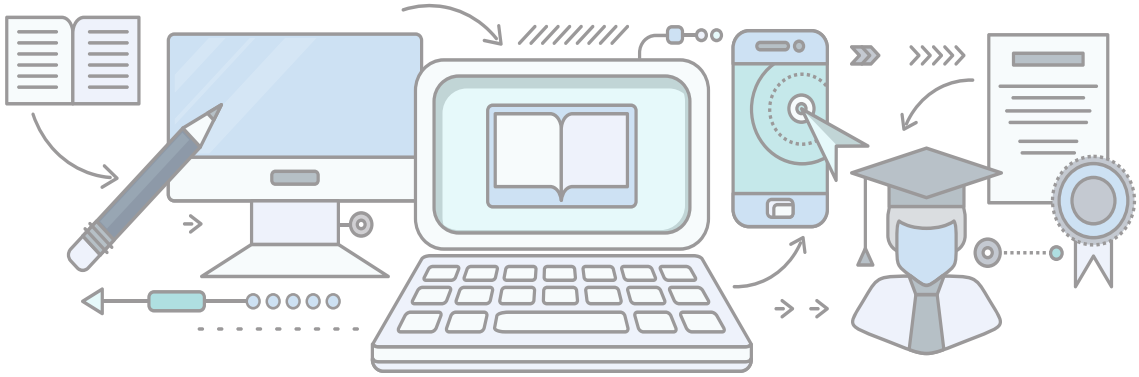
You need a course that fits around your work and life commitments. Something that'll let you be the independent learner you are and work at your own pace, while enjoying full support from trainers who are experienced planners themselves. Our Advanced Diploma of Paraplanning is 100% digital and online - no classroom time needed - so you can study on your terms.

Practical

Tired of learning theory you couldn't turn around and use in the workplace right away? So were we. That's why our paraplanning trainers have developed a course that's practical and built to feel like the best combination of reading and doing.

Nationally recognised

The Advanced Diploma of Paraplanning is nationally recognised. So not only will it help you accelerate your career, you may be able to use it as part of your pathway to a degree in financial planning. Just check with the uni of your choice before you enrol.



Study online. With a difference.

This course has been developed to give you absolute flexibility. Study on your couch, on public transport, on your break at work, out in the park – wherever and whenever you like. The best part is, with Monarch Institute, 'online' doesn't mean 'alone'. You'll be backed by our trainers at every step along the way. You'll get:

- Easy-to-follow course materials
- Videos and webinars
- Support from your course trainers (phone, email, Zoom)
- A dedicated admin team on hand to guide you
- Online assessments
- Access to a student Facebook group

What is the course duration?

This course was designed to be completed within 24 months. This allows time to fit study around other work and social commitments.

Your completion time frame depends on your previous education, work experience, time availability and work rate. There are no minimum time requirements, so you can complete the course as quick as you like.

What is the course structure?

This course is delivered completely online. This means you'll access your learning and assessment resources using an online portal. You can access this anywhere and anytime.

You'll need to study a total of 12 nationally recognised units.

What are the entry requirements?

There are no formal entry requirements. Just bring your drive, motivation and passion for the industry. That said, if this is your first time studying at this level, we'll need to check your levels of English and maths before you enrol. People with disabilities are encouraged and supported to apply.

Course costs

Monarch's courses are competitively priced.

Check our website for the most up-to-date prices at **www.monarch.edu.au/courses** or call us on **1300 738 955.**

Get the skills that employers really want.

Unrivalled support. Delivered with care.

Absolute flexibility. Your way, your terms.

Nationally recognised units

The Paraplanner

- FNSINC411 Conduct work according to professional practices in the financial services industry
- FNSFPL621 Comply with ethical and operational guidelines, legislation and regulations in financial planning

The Client

- FNSCUS516 Record and implement client instructions

The Practice

- FNSPRM611 Monitor and review organisational system compliance with legislation and regulations

Managed Funds Advice

- FNSFPL609 Prepare advice in managed investments

Research Activities

- FNSINC511 Conduct financial product research to support product recommendations
- FNSFPL622 Conduct financial planning analysis and research

Superannuation Advice

- FNSFPL610 Prepare advice in superannuation

Insurance Advice

- FNSFPL619 Prepare advice in life insurance

Prepare, Present & Implement Advice

- FNSFPL614 Develop financial plans
- FNSFPL615 Present and negotiate financial plans
- FNSFPL616 Implement financial plans

Jobs and career pathways

Your springboard to a new career

Dedicated professional paraplanners are in strong demand. There are hundreds of advertised vacancies across the country, in different cities, many with remote work and flexible work options. Not to mention the pay is above average too.

Traditionally, paraplanners worked in their role for a couple of years while studying to become a planner, or slowly worked their way up from administration positions. The Advanced Diploma of Paraplanning changes all that. It's the first nationally recognised qualification for paraplanners who are serious about their role in helping change people's lives through great financial advice. The Advanced Diploma is a great way to show potential employers that you're serious about doing the best job possible as a paraplanner. Plus you'll graduate confident and job-ready for a wide variety of real challenges, from compliance management to new product research.

Key opportunities include:

- Associate financial planner/adviser (in a junior capacity)
- Paraplanner
- Financial planning practice manager
- Compliance officer at a financial planning firm (Australian financial services licensee AFSL)
- Call-centre adviser for either an insurance provider, investment fund management provider, investment platform provider or superannuation provider
- Back-office superannuation operations officer
- Back-office insurance operations officer
- Back-office fund management operations officer
- Back-office investment platform operations officer
- Investment corporate actions support officer

Industry insights



Employment/positions projection
32.2% growth to 2026*



Earnings (average full time)
$2,252 per week



Full time vs part time
79% full time

Sources: Labour Market Information Portal, 2023
*based on categorisation of paraplanners as ANZSCO 222112, not as clerks/admin, due to level of skill and qualification required.

Why choose Monarch Institute?

You need a different learning experience. We're ready to deliver.

Expertise

- ✓ Courses developed with leading academics and industry associations
- ✓ Delivered by brilliant trainers who work with corporate leaders
- ✓ Learn from professionals using real world case studies

Flexibility

- ✓ Fit study around work, family, life
- ✓ Start immediately, or down the track
- ✓ Flexible payment options

Support

- ✓ Dedicated team of trainers and support staff on hand to guide you
- ✓ Up to date, easy to understand course materials
- ✓ Fast assessment turnaround times with comprehensive trainer feedback

Enrol today

Chasing your dream job? Ready to level up in your career? Start your FNS60920 Advanced Diploma of Paraplanning with Monarch Institute today.

To discuss the course that's right for you call
1300 738 955

To find out more information email
info@monarch.edu.au

To enrol, visit our website
www.monarch.edu.au



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