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SMSF PROGRAM

SELF-MANAGED
SUPER FUNDS
PROGRAM 



KAPLAN
PROFESSIONAL

Kaplan Professional has brought together Australia's foremost education businesses to become the leading provider of professional education in the financial services industry.

What does this mean for you? High quality, flexible courses all developed by industry experts. In short, courses that will help build the future you want.

THE LEADING PROVIDER OF FINANCIAL SERVICES EDUCATION IN AUSTRALIA

STUDY AT A TIME THAT'S RIGHT FOR YOU

The Kaplan Professional advantage

We work closely with industry experts to design and deliver courses that are relevant, current and practical. As a Kaplan Professional student you'll be given privileged access to the latest trends, practices and industry insights. Ambitious to get ahead in your career? Go with Kaplan Professional.

Employer recognition

What sets us apart is the first-hand experience and knowledge you gain from our industry experts. You'll find a Kaplan Professional qualification is highly regarded among the country's largest financial services organisations, which is why we educate more people in financial services than any other education provider in Australia.

Endorsed by Finsia

All of Kaplan Professional's financial services courses are endorsed by the Financial Services Institute of Australasia (Finsia), the leading professional body in the financial services industry.

Accredited and approved

Kaplan Professional's courses are accredited as higher education or vocational education qualifications under the Australian Qualifications Framework. Some courses also provide the education requirements to give financial product advice in accordance with the Australian Securities and Investments Commission's (ASIC) Regulatory Guide 146 (RG 146).

STUDYING WITH KAPLAN PROFESSIONAL

Working and studying at the same time isn't easy. We understand this. Which is why we do our best to make it easier for you to fit study into a busy schedule.

Study anywhere, anytime

Our flexible study options and use of the latest online technology make it easier for you to still have a life as you further your career. We give you plenty of time to complete your course and let you choose how you want to study, so you can study at your own pace, study wherever you are and adjust your study load to suit your lifestyle.

Enjoy the experience

Our courses are self-contained and delivered by self-study, with intensive Focus Sessions for selected subjects.

Immerse yourself in knowledge

Comprehensive course materials and resources — developed by industry and education experts — are delivered straight to your door.

Access personal support

Dedicated technical support via email connects you to industry experts who can answer your questions about course materials and assessments. We also offer a number of other support services, such as Student Advisers, to help you complete your studies.

Stay informed

Visit www.kaplanprofessional.edu.au to keep in touch with career-enhancing news and events such as regular career seminars, information sessions and professional development events.

How to get started

Read on, you'll find more information about the Self-Managed Super Funds program, or visit www.kaplanprofessional.edu.au for more details.

Our Self-Managed Super Funds (SMSF) program provides you with more than just a fundamental understanding of SMSFs – you'll learn how to identify appropriate strategies for your clients and how to apply relevant laws and guidelines to unique client situations.

SELF-MANAGED SUPER FUNDS PROGRAM

FOR PLANNERS & ADVISERS 

This course is ideal for:

- planners/advisers
- administrators
- auditors
- trustees
- accountants
- individuals seeking to specialise in SMSFs.

Upon completion you'll be able to:

- understand SMSF and taxation issues, trust deeds and trustee responsibilities
- understand the major impact of the Financial Services Reform Act on strategic advice providers
- identify and apply appropriate strategies to unique client circumstances.

Completion requirements

To complete this program you must be deemed competent in eight compulsory topics. To demonstrate competency you must successfully complete one assignment and one exam.

Entry requirements

There is no minimum education requirement for entry into this course, however we recommend that you are RG 146 compliant in the superannuation knowledge area or have successfully completed our online SMSF self-assessment prior to enrolment.

Course length

You have up to four months from the date of initial enrolment to complete the required assignment, and up to six months from the date of initial enrolment to complete the exam.

Method of delivery

This program is delivered in a blended mode of self-study with optional intensive Focus Sessions.

Successful completion of this program does require a time commitment. Our flexible study options allow you to study at your own pace and adjust your study load to suit your lifestyle.

Industry recognition

This program is recognised by the SMSF Professionals' Association of Australia (SPAA). Students who complete this program and are SPAA members will earn valuable CPD points for their SPAA membership. Additional points are awarded for attendance of a Focus Session.



KAPLAN PROFESSIONAL'S OFFERINGS

**ADVANCED DIPLOMA OF
FINANCIAL SERVICES
(FINANCIAL PLANNING)**

**DIPLOMA OF
FINANCIAL SERVICES
(FINANCIAL PLANNING)**

**DIPLOMA OF
FINANCIAL SERVICES
(FINANCE/MORTGAGE
BROKING MANAGEMENT)**

**CERTIFICATE IV IN
FINANCIAL SERVICES
(FINANCE/MORTGAGE BROKING)**

**SELF-MANAGED
SUPER FUNDS PROGRAM**

**MARGIN LENDING AND GEARED
INVESTMENTS PROGRAM**

COMMERCIAL FINANCE PROGRAM

**START TODAY – VISIT:
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