Learn, to lead.
Unit Trust Administration

This short course provides an outline of the legislative and regulatory environment in which unit trusts operate. It also covers the administrative, tax and registry systems and processes involved.

This short course is ideal for unit trust administration staff and professional service providers, including platform administrators, customer service, support services such as IT and marketing, and outsourced service providers. For more information please visit our website.

www.kaplanprofessional.edu.au

THE KAPLAN ADVANTAGE
Written for the industry by the industry

LEARN AND EARN
Earn CPD points for participating

ADAPTABLE
Suited to staff working in a variety of roles

COMPETITIVE EDGE
Practical and relevant learning to gain the essential knowledge of legislative and regulatory environment in which unit trusts operate along with the processes involved

ENGAGING DELIVERY
Face-to-face workshops enable networking with colleagues and the exchange of knowledge & ideas
LEARNING OUTCOMES

- Learn how unit trusts work, how they are regulated and the associated administrative processes and procedures involved
- Obtain the skills to assist customers with registry, reporting, taxation and social security enquiries.

TOPICS COVERED

- How unit trusts work – the types of trusts, responsible entities, trustee companies
- Regulatory environment
- Understanding how to meet the compliance obligations
- Administrative procedures and processes
- Unit trust registry processes
- Tax and social security as they apply to investors in unit trusts interest

CPD

Recommended 14 CPD hours upon completion of this workshop.

Entry Requirements
While there are no formal entry requirements for this workshop, it is preferable that students have some prior knowledge of the financial industry.

Course Delivery
Delivered as a workshop targeting the needs of small groups and is ideal for in-house professional training and dealer groups.

Duration
Two (2) day workshop
9:00am - 5:00pm

Assessment
There is no assessment as part of this workshop.

Exemption
No exemptions are available for this workshop.

Units of Competency
No units of competency are awarded for this course.

Fees
An updated schedule of fees is available on our website.

With over $1 trillion invested in managed funds, the Australian funds management sector is the largest in the world on a per capita basis. As an important source of capital for financial markets, efficient and accurate administration of the underlying structures and unit trusts is crucial.

“Kaplan is the most reputed institution when it comes to financial services education. After doing a bit of research I found that Kaplan students are getting an edge when it comes to credibility of the course and material.”

Gayathri Suriyanarayanan

Contact us on 1300 662 203 or via email at mail@kaplan.edu.au or alternatively speak to your Business Development Manager.

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