Learn, to lead.

Financial Planner Level 2

Advanced Diploma of Financial Planning (FNS60415)

The Kaplan Financial Planning Level 2 course focuses on providing in-depth knowledge and practical applications designed to enhance career prospects for individuals in the financial planning profession.

This course allows individuals to develop advanced skills to provide a comprehensive range of financial planning services to clients with complex needs, including essential skills for developing successful client relationships.

kaplanprofessional.edu.au

KAPLAN ADVANTAGE
Written by the industry for the industry

STAY RELEVANT
Ongoing continuing professional development

ONGOING STUDY SUPPORT
Hands-on assistance when you need it, by those in the know

PATHWAYS
One-stop shop training solution from a diploma to a masters degree

THE COMPETITIVE EDGE
Industry renowned courses backed by relevant case studies, which give you the practical skills to stand out from your peers

KAPLAN PROFESSIONAL

KAPLAN FINANCIAL PLANNER LEVEL 1

For those seeking entry into the financial services industry as a financial planner or adviser.

DFP 1: Financial Planning Fundamentals
DFP 2: Insurance and Risk Protection
DFP 3: Superannuation and Retirement Planning
DFP 4: Securities and Managed Investments

Completion

The Diploma of Financial Planning (FNS50615) qualification will be awarded on successful completion of DFP 1 - DFP 3.

KAPLAN FINANCIAL PLANNER LEVEL 2

For those looking to advance their career and skills while creating a competitive edge.

DFP 5: Tax for Financial Advising
DFP 6: Estate Planning
DFP 7: Client Engagement Strategies
DFP 8: Advanced Financial Planning

Completion

The Advanced Diploma of Financial Planning (FNS60415) qualification will be awarded on successful completion of DFP 5 - DFP 8.

SPECIALIST KNOWLEDGE PROGRAMS

SMSF
Advanced SMSF
Derivatives
Margin Lending

Postgraduate Programs

Graduate Certificate in Financial Planning
Graduate Certificate in Applied Finance
Graduate Diploma of Financial Planning
Graduate Diploma of Applied Finance
Master of Applied Finance
Master of Financial Planning

COURSE OVERVIEW

- Gain an in-depth understanding of taxation and estate planning as they relate to financial planning strategy
- Develop client engagement strategies to help build and strengthen successful relationships
- Identify appropriate strategies that apply to different client circumstances
- Apply financial planning skills to complex client scenarios
- Demonstrate knowledge of the legislation, regulations and code of practice as directed by ASIC for professional advice

COMPLETION DFP 5 - DFP 8 (LEVEL 2)

Become equipped with practical client engagement strategies and apply advanced financial planning skills to complex client scenarios with confidence. On completion of DFP 5 - DFP 8 individuals will be awarded the nationally recognised Advanced Diploma of Financial Planning (FNS60415).

Following the inclusion of financial planners under the Tax Agent Services Act 2009 (TASA), Kaplan Professional's DFP 5 – Tax for Financial Advising subject meets the Tax Practitioner Board's requirements for a course in Australian taxation law.

"Rather than just the theory, I learnt practical application of knowledge. I found the way that the scenarios used in the course material were described, were almost identical to the real-world application. Not only did I gain knowledge, I gained a new outlook on dealing with clients."

David Cooper

Enrolment Date

Start anytime.

Entry Requirements

Students must successfully complete the Kaplan Financial Planner Level 1.

Exemptions

Exemptions may be granted on the basis of previous study and/or experience.

Duration

12 weeks per subject. Maximum time for completion of the Advanced Diploma of Financial Planning (FNS60415) qualification is two (2) years from activation date.

Delivery

Online: self-study access to a virtual classroom.

Assessment

Two (2) assignments, one (1) simulated client presentation, two (2) multiple-choice exams and one (1) short-answer exam.

Completion

Individuals who successfully complete DFP 5, DFP 6, DFP 7 and DFP 8 will be awarded the Advanced Diploma of Financial Planning (FNS60415) qualification.

Fees

For an updated schedule of fees, please visit our website.

Correct at time of printing. Please refer to our website for more information.
kp.edu.au/fplevel2

Nationally Recognised Training

Celebrating 15 years
Ontrack
Knowledge is power

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