KAPLAN PROFESSIONAL

campusafa
formal | practical | community

AFA3 Advanced Advice Solutions

Subject overview

This subject explores complex client scenarios and enhances students technical expertise and capability through a complex advice strategy paper. It will provide you with the expertise to solve clients problems through the construction of advice solutions that improve the wellbeing and financial situation of your specific client segment.

Learning outcomes

On successful completion of this subject, you should be able to:

1. Develop advanced technical skills in financial advice.
2. Develop complex strategies for financial advice.
3. Recommend appropriate solutions to client scenarios.

Subject snapshot

The table below provides a quick overview of this subject. It lists each topic and identifies when assessment items occur. This snapshot is a useful tool for developing a study plan.

Week(s)	Topic name
1	Topic 1: Superannuation strategies
2	Topic 2: Self Managed Super Funds
3	Topic 3: Portfolio construction
4	Topic 4: Strategies for wealth accumulators
5	Topic 5: The art of estate planning
6	**Assignment 1 (Weighting 50%)**
7	Topic 6: Aged care strategies
8	Topic 7: Income streams
9	Topic 8: Risk strategies
10-12	**Assignment 2 (Weighting 50%)**
	Total hours: 120

Subject assessment

Assessment	Description	Week	Topics	Weighting	Subject Learning outcomes assessed
Assignment 1	Pre-retirement case study.	Week 6	1–5	50%	LO1–3
Assignment 2	Post-retirement case study.	Week 12	6–8	50%	LO1–3