KAPLAN PROFESSIONAL

Vocational Education CPD Mapping*

Knowledge Area	Tax for Financial Advising (DFP5)^	Estate Planning (DFP6)	Client Engagement Strategies (DFP7)	Advanced Financial Planning (DFP8)	Accountants SMSF Package	Accredited Listed Product Adviser Program (ALPA)	Accredited Derivatives Adviser Level 1 (ADA1)	Accredited Derivatives Adviser Level 2 (ADA2)	Self Managed Superannuation Funds	TASA and the TPB Code of Professional Conduct
Generic Knowledge										
Financial Planning	4		1.7	6						
Personal Taxation Issues (Financial Planning Stream)	2									
Securities						1				
Derivatives						1	5	5		
Managed Investments						3				
Fixed Interest										
Foreign Exchange										
Superannuation					1					
Self Managed Superannuation Funds					4				5	
Retirement Income Streams										
Social Security and Aged Care										
Life Insurance										
General Insurance										
Estate Planning		5								
Taxation (Specialist Stream)										2
Deposit Products and Non-cash Facilities										
Credit and Mortgage Broking										
Practice Management										
Skills			2.3							
Ethics										
Margin Lending and Geared Investments										
Knowledge Area Total	6	5	4	6	5	5	5	5	5	2
TASA	0	5	4	6	5	5	5	5	5	0
FASEA										
Technical Competence	6	5			5	5	5	5	5	
Client Care and Practice			4	6						
Regulatory Compliance and Consumer Protection										2
Professionalism and Ethics										
General										

* Kaplan Professional recommends the above CPD hours on completion of the listed courses/subjects. CPD hours are to be applied and approved in accordance with your licensee's CPD policy.

^ DFP5 and Code of Professional Conduct completion does not award TASA CPE hours but provides basis for TPB tax (financial) adviser registration. CPE hours are awarded for activities completed post-registration.

Knowledge Area	Tier 1 Margin Lending - General Advice	Tier 1 Margin Lending - Personal Advice	Anti-Money Laundering	Bullying in the Office	Code of Conduct^	Cyber Security	Equity and Diversity	Fraud Awareness	Privacy Awareness	Social Media	Understanding and Analysing Financial Statements
Generic Knowledge			0.5			0.5		0.5	0.5		4
Financial Planning											
Personal Taxation Issues (Financial Planning Stream)											
Securities											
Derivatives											
Managed Investments											
Fixed Interest											
Foreign Exchange											
Superannuation											
Self Managed Superannuation Funds											
Retirement Income Streams											
Social Security and Aged Care											
Life Insurance											
General Insurance											
Estate Planning											
Taxation (Specialist Stream)											
Deposit Products and Non-cash Facilities											
Credit and Mortgage Broking											
Practice Management				0.5	0.5		0.5			0.5	
Skills											
Ethics											
Margin Lending and Geared Investments	2	3									
Knowledge Area Total	2	3	0.5	0.5	0.5	0.5	0.5	0.5	0.5	0.5	4
TASA	2	3	0	0	0	0	0	0	0	0	0
FASEA											
Technical Competence	2	3									
Client Care and Practice											
Regulatory Compliance and Consumer Protection			0.5								
Professionalism and Ethics											
General				0.5	0.5	0.5	0.5	0.5	0.5	0.5	4

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