



## Advanced Program in Finance and Mortgage Lending

# Program outline

## Advanced Program in Finance and Mortgage Lending

### Program overview

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This program is designed for experienced individuals that are currently working in the finance and mortgage lending industry.

This program will further develop students' knowledge and skills in the fields of advanced business and personal finance, international financing, mentoring, compliance, risk management and accounting principles.

### Benefits of program completion

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Upon successful completion of the Advanced Program in Finance and Mortgage Lending, students may apply to the CFMIA to carry either the 'Certified Finance Broker' (CFB) or 'Certified Finance Consultant' (CFC) designation.

### Learning outcomes

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Upon successful completion of this program, students should be able to:

1. Differentiate between products in the market to ensure they appropriately advise the client on which product to undertake
2. Examine their clients' immediate financial position by using a fact find and determining when to introduce a product to a client
3. Demonstrate an understanding of the NCCP Act 2009 and how to avoid potential breaches
4. Structure a product to meet the client's needs and financial position
5. Apply accounting principles
6. Implement the requirements of a responsible manager to work practices

### Program topics

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1. Advanced business finance (Product Knowledge)
2. Advanced personal finance (Product Knowledge)
3. International Financing (Product Knowledge)
4. SMSF & LRBA's (Product Knowledge)
5. NCCP Act 2009 concepts
6. Obligations
7. Measuring and managing risk
8. Accounting principles
9. Credit management
10. Mentoring and sponsorship

## Program duration

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Students have a total of twelve (12) weeks to complete the learning and assessment requirements of the Advanced Program in Finance and Mortgage Lending, from their initial activation date.

## Entry Requirements

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Students must hold the FNS40815 Certificate IV in Finance and Mortgage Broking to enrol in this program.

## Delivery mode

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This program is delivered online.

Kaplan’s online learning portal KapLearn enables the provision of innovative, interactive learning resources and support. KapLearn can be accessed anywhere at any time using a computer or mobile device that has internet access. Students are also provided with hard copy program notes for their reference.

KapLearn is the access point for program notes, practice activities and assessments. KapLearn is also the access point for ongoing support. The ‘Ask your tutor’ forum provides students with continuous administrative support for any queries on how to access the program materials or how to complete the assessment requirements for this program.

## Assessment tasks

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The assessment tasks for this program are listed below.

Program	Assessment	Assessment Detail
Advanced Program in Finance and Mortgage Lending	One (1) Assignment	Written assignment - two (2) attempts <ul style="list-style-type: none"> <li>• Option to complete one (1) of the two (2) case studies presented in the assignment:               <ul style="list-style-type: none"> <li>– Case Study A – includes three (3) tasks with short answer questions</li> <li>– Case Study B – includes three (3) tasks with short answer questions</li> </ul> </li> </ul>
	One (1) Online quiz	Unsupervised, multiple choice quiz - three (3) attempts

Students need to complete the online quiz and submit their assignment within twelve (12) weeks of their initial activation date. To successfully complete this program, students must demonstrate competency in the assignment, as well as achieve a pass rate of 70% in the online quiz.

## Recognition of Prior Learning

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There is no Recognition of Prior Learning (RPL) for this program.

## Fees

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An updated schedule of fees is available at the Kaplan Professional website: <<http://www.kaplanprofessional.edu.au/faqs/financial-services-fees>>.

## Student policies

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Students who enrol in a Kaplan Professional course are bound by our published policies, including the policy that sets out our rules for assessment. Students can review these policies and our terms and conditions before they enrol by going to the Kaplan Professional website: <<http://www.kaplanprofessional.edu.au/fags/studentpolicies>>. The policies also assist students when their study program does not go as planned and they need extra support.