

Melbourne Burwood Campus
Geelong Waterfront Campus
Warrnambool Campus
Online



DEAKIN
BUSINESS
SCHOOL

Whether you're a financial services professional or you're starting out in the profession, enhance your education and skills at one of the world's leading universities.

Deakin's range of **FAS-approved** courses will give you the knowledge and skills to meet the standards required of a financial planning professional. Leaders in Financial Planning education for almost 30 years, our courses are highly respected and recognised within both the industry and international accrediting bodies.

Education standards for Financial Advisers

The **Financial Adviser Standards** (FAS) has established education requirements for all new and existing financial advisers. All existing advisers will need to have completed further study by 2026, and a national examination by January 2022. While the extent of the study required will depend upon your qualifications and recognition of prior learning (RPL), as a minimum all existing advisers will need to complete further studies in Ethics for Financial Services (MAA769/MAI769). For assistance on how this applies to you, please contact us.

Recognition of prior learning

You can reduce your overall study time and tuition cost by getting your work and previous study experience recognised as recognition of prior learning (RPL).

If you are an existing adviser, the easiest way to determine the study you require to fulfil the FAS requirements is to use our bespoke **advisor education pathway tool**.

Advance your skills with interactive intensives

Immerse yourself in our new learning experience with our intensive programs, equivalent to completing a unit over a 12-week trimester. Students will undergo 3 days of classroom learning through our practical presentations and applied case studies, with additional support through comprehensive online resources. The program is the same price as undertaking its regular mode, while being in a supportive and flexible learning environment that allows you to learn and network with fellow advisers. **Find out more.**

Does Deakin offer B2B partnerships?

Deakin currently works with various partners in the financial services sector. We assist them in meeting their education and training requirements, in a cost-effective and timely fashion. To find out how you can benefit if you are affiliated with our partners, or wish to learn about how to become a B2B partner, contact our Financial Planning team.



'While it can be intimidating to go back to study, many find it stimulating and refreshing. Mature-age students established in their careers often find they reconnect with the original passion that propelled them into the field.'

Marc Olynyk
Program Director, Financial Planning

Why should I choose Financial Planning at Deakin over other education providers?

Deakin offers a whole host of benefits:

- A flexible learning environment to suit your needs and lifestyle that includes on-line learning, on-campus classes and the intensive delivery mode.
- We offer a full complement of FAS approved financial planning courses at both undergraduate and postgraduate level. We also offer the three bridging units as stand-alone non-award enrolments.
- All of our full time financial planning staff are either current or former advisers who understand the pressures of the profession.
- We offer complimentary mapping and Recognition of Prior Learning (RPL) service.
- You will graduate with a tertiary qualification from a university that is respected and widely recognised by the community.
- Each unit has a dedicated, allocated academic who is available to answer your queries and support your studies.
- We offer CPD Certificates at no charge for completed financial planning units and from CPD webinars.

Contact us

Domestic and B2B Enquiries
Telephone: +61 3 9251 7969
Email: financial-planning@deakin.edu.au

International
Telephone: +61 3 9627 4877
Email: study@deakin.edu.au

Book a phone consultation
calendly.com/deakin-university/financial-planning

Financial Planning study options

You can gain access into a course, and reduce your overall study time and tuition cost, by getting your work and previous study experience recognised with recognition of prior learning (RPL). Work towards a Masters degree over time, or complete your postgraduate qualification early by completing the required units to earn a graduate certificate or a graduate diploma.

24 CREDIT POINTS

Bachelor of Commerce

4 CREDIT POINTS

Graduate Certificate of Financial Planning

8 CREDIT POINTS

Graduate Diploma of Financial Planning

12 CREDIT POINTS

Master of Financial Planning

12 CREDIT POINTS

Master of Business Administration

Deakin's Master of Business Administration (MBA) includes the option for a Financial Planning specialisation designed for those who already hold a FAS approved degree and/or those who need to complete up to 4 FAS bridging courses (1 FAS bridging course is equivalent to 1 Deakin unit of study).

Study support

We will support your learning through a variety of channels including:

- a guide for each unit with clear expectations of learning goals and resources and assessment tasks
- lecturers and/or tutors available both in person and online for students to speak with and get support from
- study groups available both online and in person
- fully recorded **webinar sessions** that can contribute to your CPD
- academic support for students who have not studied in a significant time. This support includes orientation and study skills in academic writing, finding and referencing appropriate sources, an introduction to the expectations associated with postgraduate assessments, strategies for managing time, planning effective study schedules, and where to seek study and learning assistance.



Why choose Deakin?



Deakin Business School is in the top 1% of business schools globally by holding both AACSB and EQUIS accreditations



Among the top 1% of universities worldwide
Shanghai Ranking's Academic Ranking of World Universities (2019)



#1 University for student satisfaction in Victoria for nine consecutive years. You will be supported by a wide range of student support services

Australian Graduate Survey (2010–15) and QILT Student Experience Survey (2016–19)



40 years of distance and online teaching excellence.



Study at your own pace via Deakin's flexible **Cloud Campus**. You choose when and where to study online.

Visit deakin.edu.au/cloud to find out more.



Rated 5 stars for our world-class facilities, teaching and above world-standard research

QS Stars University Ratings, Excellence in Research Australia (ERA) 2019

Professional recognition

FAS/FASEA approved Course

The Master and Graduate Diploma of Financial Planning are a FAS-approved courses. Graduates will satisfy the education standards prescribed by FAS to be able to provide financial advice in Australia, subject to meeting other registration requirements prescribed by FAS (including completion of a Professional Year for Provisional Relevant Providers and passing a National Adviser Exam).

Practitioners Board (TPB)

Completion of Principles of Income Tax Law and Business Law units approved by the Tax Practitioners Board (TPB), will meet the education requirements of the Tax Agent Services Act (TASA).

Professional Designation programs

Deakin University has entered into partnerships with a number of leading organisations to embed their professional designation program into the Master of Financial Planning course. Students may be eligible to enrol externally through the following professional designation programs as their elective unit into the Master of Financial Planning:

Financial Advice Association Australia (FAAA)

Students have the opportunity to complete the CFP® capstone unit (CFPC) as their elective unit and satisfy the education requirements to become a CFP®

Self-Managed Superannuation Fund Association (SMSF)

Students have the opportunity to complete the SMSF Specialist Advisor (SSA™) program as their elective unit and satisfy the education requirements to be an Accredited SMSF Association Specialist Adviser.

Aged Care Steps

Students have the opportunity to complete the Aged Care Professional™ accreditation program through Aged Care Steps.

TAL Risk Academy

Students completing specified modules and assessment tasks through the TAL Risk Academy will be entitled to a credit within the Master or Graduate Diploma Financial Planning courses.

Professional pathways

The Master of Financial Planning provides advanced standing into the Fellow Chartered Financial Practitioner (FChFP) provided by the Financial Advice Association Australia (FAAA) and the CFP® Certification Program offered by the FAAA.

Society of Trust and Estate Practitioners (STEP)

Students who successfully complete MAA747 Managing Intergenerational Wealth (previously titled 'Administration of Trusts and Estates') as their elective unit with the Master of Financial Planning will meet the Australian educational requirements for membership of the Society of Trust and Estate Practitioners (STEP).

Deakin offers three units that are equivalent to the FAS bridging courses and are accredited and approved by FAS as meeting the relevant qualifications and course standards. You have the option to take these units as stand-alone, non-award units via online delivery, allowing you to study these units in your own time from anywhere in the world or through an **intensive delivery model**.

FAS bridging course subject

Deakin unit

Financial Advice Regulatory & Legal obligations

.....

Ethics for Professional Advisers

.....

Behavioural Finance: Client and Consumer behaviour,
Engagement and Decision Making

.....

FAS approved unit
(Financial Advice Capstone subject)

.....

* Available as **intensive units**.

'I've thoroughly enjoyed my time at Deakin and can't recommend this course enough for any adviser looking to further their skills and knowledge. I was motivated to complete this qualification to improve the advice outcomes for my existing clients and for clients I will advise in the future.'

► **Jeffrey Bonnici**

Master of Financial Planning student

Am I eligible to apply? Find entry requirements and application assistance at the links below.

Designed to meet the current and future needs of the industry, the Graduate Certificate of Financial Planning places a strong emphasis on preparing professionally responsible financial planners, both in an ethical and compliance sense.

The Graduate Certificate of Financial Planning incorporates the Financial Adviser Standards' (FAS) three bridging units providing advisers with an opportunity to complete the bridging units and gain a formal qualification.

On completion of the Graduate Certificate of Financial Planning, you may wish to articulate into Deakin's Graduate Diploma of Financial Planning or Master of Financial Planning.

Course breakdown



The exact number of credit points you study depends on how much credit you receive as recognition of prior learning (RPL) from your professional experience and previous qualifications.

Core units

* Available in **intensive mode**.

Elective units

Course information

Course code: M569

Years: 1 year part-time

Campus: Melbourne Burwood Campus, online

Intake: Trimester 1 (March), Trimester 2 (July), Trimester 3 (November)



Am I eligible to apply? Find entry requirements and application assistance at the links below.

This professionally oriented course prepares graduates for career progression and to satisfy the FAS education requirements for both new and existing advisers. If you're a current financial planner returning to study, you'll gain enhanced knowledge and skills in areas such as critical thinking, problem solving and analysis.

On completion of the Graduate Diploma of Financial Planning, you may wish to articulate into Deakin's Master of Financial Planning, by completing 4 additional units.

Course breakdown



The exact number of credit points you study depends on how much credit you receive as recognition of prior learning (RPL) from your professional experience and previous qualifications.

Core units

Elective units

* Available in **intensive mode**.

Course information

Course code: M669

Years: 1 year full-time or part-time equivalent

Campus: Melbourne Burwood Campus, online

Intake: Trimester 1 (March), Trimester 2 (July), Trimester 3 (November)



Am I eligible to apply? Find entry requirements and application assistance at the links below.

The Master of Financial Planning (MFP) is approved by FAS as meeting the needs of the financial planning industry in both an ethical and a compliance sense. The course is aimed at both those aspiring to move into the financial planning industry as well as those currently employed within it seeking a qualification that recognises the higher level of knowledge and skills required of a modern professional planner.

Degree-qualified advisers can enter immediately at the master's level but if you do not hold a bachelor's degree, you will need to enrol into the Graduate Certificate or Graduate Diploma of Financial Planning course first. Credit may also be available for prior learning and relevant work experience.

Core units

* Available in **intensive mode**.

Career outcomes

- financial adviser
- insurance adviser
- business development manager
- superannuation consultant
- portfolio analyst
- personal financial planner
- investment banker
- paraplanner
- claims administrator
- compliance manager
- risk adviser.

Course information

Course code: M769

Years: 1.5 years full-time or part-time equivalent

Campus: Melbourne Burwood Campus, online

Intake: Trimester 1 (March), Trimester 2 (July), Trimester 3 (November)

Course breakdown



The exact number of credit points you study depends on how much credit you receive as recognition of prior learning (RPL) from your professional experience and previous qualifications.

Elective units

1 credit point of elective units can be chosen from a wide range on offer. For a full list of the elective units available **click here**.

Professional recognition

Students who select to undertake the CFP® Certification Unit as their elective option within the Master of Financial Planning will have satisfied all of the education requirements of the CFP® Certification Program upon graduating. **Find out more**. Additionally, students have the opportunity to complete the SMSF Specialist Advisor (SSA™) program as their elective unit and satisfy the education requirements to be an Accredited SMSF Association Specialist Adviser.

Am I eligible to apply? Find entry requirements and application assistance at the links below.

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Contact us

Domestic and B2B Enquiries

Telephone: +61 3 9251 7969

Email: financial-planning@deakin.edu.au

International

Telephone: +61 3 9627 4877

Email: study@deakin.edu.au

Book a phone consultation – calendly.com/deakin-university/financial-planning

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