



Assisting
Beyond
Expectation



Certificate IV in Financial Services

Includes ASIC Tier 2 Accreditation for General Insurance Products

Unlock the potential of your people

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NATIONALLY RECOGNISED
TRAINING

The Certificate IV in Financial Services FNS40107 is a nationally recognised qualification under the Australian Qualifications Framework, and may also be completed as part of a traineeship.

TARGET AUDIENCE

This programme is aimed at general insurance and insurance broking staff wishing to attain, or upgrade to a Certificate IV level qualification or those embarking on a traineeship. The initial modules in the Certificate IV can be used for new entrants to the industry or workplace and are suitable for inclusion as part of a workplace induction programme.

ENTRY CRITERIA / PRE - REQUISITES

There are no formal pre-requisites for this qualification.

DELIVERY AND ASSESSMENT

Gold Seal's Certificate IV in Financial Service is offered as a distance education or blended delivery programme. A phone and e-mail support service is available for individuals or small groups.

Statements of Attainment will be issued progressively for each module once assessed and competency has been demonstrated by the student.

Distance Education

The distance education programme consists of three modules. Completion of the modules includes workplace-based assessment activities which will be verified through an 'Assessment Portfolio' submitted to Gold Seal.

Blended Delivery

The blended delivery programme enables students to complete the *ASIC Tier 2 Accreditation* module through a 1-day workshop. The *ASIC Tier 2 Accreditation Workshop* consists of pre-course work, attendance at the 1-day workshop and a workplace assignment. These are available through publicly advertised courses and can also be run in-house.

COURSE OUTLINE – CERTIFICATE IV IN FINANCIAL SERVICES

Completion of all modules will satisfy the accreditation requirements for a Certificate IV in Financial Services as well as ASIC Tier 2 Accreditation for General insurance products.

Introduction to the Insurance Profession

This module covers the fundamental communication skills required to work in the insurance industry and how to apply principles of professional practice to work in the financial services sector.

Customer Relationship Management

This module will assist the development of the skills and knowledge required for professional client interactions. It covers telephone service skills, responding to customer enquiries, maintaining customer relationships, customer complaints and dispute resolution.

ASIC Tier 2 Accreditation

This module covers the principles, knowledge, skills and compliance requirements for providing advice to retail clients. The completion of this module will satisfy the requirements for ASIC Tier 2 Accreditation for general insurance products.

PROGRAMME FEES

Previously completed education and work history may reduce the number of modules required to achieve this qualification. Students who have previously completed units of competency with other accredited institutions and/or who have solid professional work experience should contact Gold Seal who will map individual pathways against the Certificate IV in Financial Services requirements.

Programme fees for the full Certificate IV course are currently:

- Distance education:
 - \$800 Introduction to the Insurance Profession (no GST)
 - \$400 Customer Relationship Management (no GST)
 - \$500.00 ASIC Tier 2 Accreditation (no GST)
- Workshop:
 - \$700.00 for *ASIC Tier 2 Accreditation* (no GST)

Traineeship Administration fees are currently \$350.00 per student, per traineeship. (no GST)

ENROLMENT

To enrol, prospective students will need to complete an enrolment form. Gold Seal Practice Management may be contacted for a copy on 03 9510 5100 or email education@goldseal.com.au.