

# Financial Planning

Melbourne Burwood Campus  
Cloud Campus



Deakin University is a leading provider of financial planning education offering a range of solutions to suit the education requirements of the financial planning profession.

Deakin offers a number of FASEA-approved degree programs that are delivered by an experienced team of industry professionals consisting of leading educators, researchers and industry experts.

## What are FASEA's education requirements?

- From 2019 new advisers will have to hold an approved degree (or equivalent) and complete a probationary professional year.
- By January 1, 2024 all existing advisers will need to have completed an approved degree (or equivalent) to raise their qualifications to a bachelor degree level, or higher or equivalent qualification.
- All advisers will also be required to pass a national examination by 1 January 2021.

## Courses available

Please click each course below for further information:

- **Graduate Certificate of Financial Planning**
- **Graduate Diploma of Financial Planning** FASEA approved
- **Master of Financial Planning.**

## Bridging units – FASEA approved

- **MAA769– Ethics for Financial Services**
- **MAA728– Financial Behaviour and Decision Making**
- **MLM717 – Financial Services Regulation**

Deakin has flexible education pathways to suit your needs and requirements. Advisers with either a degree or at least 2 years of relevant work experience are able to enter directly into the Graduate Certificate or Graduate Diploma of Financial Planning and may be eligible for credits or advanced standing. Deakin is able to individually assess your advisers qualifications and experiences and recommend appropriate education pathways.

## Why Deakin is your one-stop-shop

Deakin offers a wide range of education services designed to meet the various regulatory requirements of FASEA. Studying at Deakin will provide you with access to a range of services including:

- **bridging courses** – we offer subjects covering: Corporations Act, The FASEA Code of Ethics and Behavioural Finance
- **credit assessment** – we recognise both formal learning (qualifications) and informal learning (work experience)
- **professional recognition** – our financial planning courses have been approved for entry into the certification programs for both the FPA and AFA, and you may be eligible for credits into the certification programs
- **national examination preparation** – we will offer a service to assist you in preparing for the national examination and give you the greatest chance of success.
- **intensive study** – we will offer an intensive study option for the three bridging units, which will allow your advisers to finish all classroom activity within a three day period. Contact us to learn more.

## Eligibility to credits or advanced standing

We understand that many advisers will have accumulated a significant amount of knowledge and skills from their previous studies and employment. Accordingly, we aim to recognise and reward students with as much credit as possible, which has the potential to significantly reduce both the length and cost of the course. Advisers may be eligible for advanced standing with a DFP (1-8), ADFP, certification programs of the financial planning associations and other tertiary studies. Check the table on the next page or contact us to see what credit you can receive. Please note that the table is a guide-only, you will need to **apply** for our course to receive a formal assessment.

Previous study	
ADFP/DFP 1-8	2 credits
Securities Education Institute	2 credits
Certification programs (in addition to the above)	
CFP (FPA), FChFP (AFA), CPA (FP electives)	2 credits
SMSF, CA, CPA	1 credit

## Flexible delivery

Deakin University is a pioneer in off-campus education and a current higher-education leader in online learning. All courses are offered via online delivery and supported by a world-class learning platform. The university's sophisticated and innovative online learning platform – **CloudDeakin** – provides advisers with a highly-visual, media-rich and interactive learning experience. It also offers your advisers the flexibility to study when and where it suits them best.

## Professional recognition

Deakin Business School is accredited with AACSB International, the longest serving global accrediting body for business schools in the world. Only 5% of business programs worldwide are AACSB accredited. Deakin Business School is one of only three in Victoria, Australia.

- Graduates of the Bachelor of Commerce (Financial Planning), Graduate Diploma of Financial Planning and Master of Financial Planning courses are eligible for entry into the Certification Programs of the Financial Planning Association (FPA) – CERTIFIED FINANCIAL PLANNER® (CFP) as well as the Association of Financial Advisers (AFA) – Fellow Chartered Financial Practitioner (FChFP).
- Successful completion of Deakin's Master of Financial Planning also provides advanced standing for three of the five CFP certification units and two of the four units offered within the FChFP program.



## Which education pathway is best for our advisers?

It is important to select the education pathway that is right for you. There are a number of education options available, including qualifications and industry designations.

Key considerations to determine the right path include:

- Examine the institution's entry requirements – previous qualifications and industry experience are all key entry criteria.
- Check for RPL (Recognition of Prior Learning). Does the institution recognise previous studies or relevant work experience and provide eligibility for credit or advanced standing into courses?
- Choose an institution that provides maximum study support and 24/7 accessibility.
- Is it flexible? It's important to consider whether the qualification or designation is portable and offers flexibility in the education pathway. For example, can the qualification (or subjects within a course) be utilised as credit towards higher-level qualifications or additional designations? Does it meet TASA's education requirements?
- Consider the time and cost. Higher education is an investment in the future of both individuals and organisations. Choose an institution that will best support the integration of study with business and lifestyle commitments.

Deakin's unique adviser education pathway tool is designed to tell you exactly how to become FASEA-compliant, depending on your previous education and professional experience. **Visit our easy-to-use tool** and discover your pathway today.

## How to Apply

To apply please visit [deakin.edu.au/apply](https://deakin.edu.au/apply).

## Contact us

For an obligation-free discussion around choosing the Deakin financial planning course that is right course for you, please contact our dedicated Financial Planning course adviser.

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