asfa LEARNING

ASFA Learning

The superannuation specialists

2016/17 COURSE GUIDE

ASFA Learning

Welcome to ASFA Learning, the leading superannuation education and professional development provider in Australia.

We provide a wide range of courses; from customised induction programs to whole board training, so no matter what career stage is important to you and your business, we have a solution.

The superannuation industry is continually evolving and ASFA Learning draws on the comprehensive expertise of our Policy team to ensure our courses are timely, relevant and of the highest quality to keep the education standards of the industry moving forward.

Whether you need online training or workshop style face-to-face education, we encourage you to call us to discuss the best solution.

T: 02 8079 0855
W: www.superannuation.asn.au/learning

Contents

Which course is right for you?

The below table will assist you in choosing the ASFA courses that are right for you.
Further information on each course can be found on the pages noted.

Page number		Compliance and risk	Operations/IT	Administration	Investment	Member facing	Marketing and communications	Financial planning	Legal	Insurance	HR/professional development	Custodians	Trustees/ directors	CEO/senior management
	Introductory courses													
6	Super Foundations	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
6	Certificate III in Customer Engagement					✓								
7	Certificate IV in Superannuation (ASFA 100)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
	Compliance and CPD courses													
8	RG 146 Superannuation ▲	✓	✓	✓	✓	✓	✓	✓		✓			✓	
8	Personal Advice: Skills Program	✓	✓	✓	✓	✓	✓			✓			✓	
9	RG 146 Revisited	✓		✓		✓								
9	SuperCPD	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
10	Diploma of Financial Planning	✓	✓	✓	✓	✓	✓	✓		✓				
	Governance and trustee courses													
11	Reporting to the Board ◆	✓							✓			✓	✓	✓
11	In the Boardroom: Responsibilities and Practice ◆	✓							✓			✓	✓	✓
12	Core Governance for Superannuation ◆	✓							✓			✓	✓	✓
12	Superannuation Governance Masterclass ◆	✓							✓			✓	✓	✓
13	Investment Fiduciary Essentials ◆	✓			✓				✓			✓	✓	✓
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14	ASFA Certificate of Post-retirement		✓	✓		✓	✓	✓			✓		✓	
14	Super Insurance ▲			✓		✓				✓				
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16	Defined Benefits	✓		✓		✓		✓						
16	Accredited Aged Care Professional™					✓		✓						

Key

Look out for these symbols throughout the guide

▲ Subject forms part of the Diploma of Superannuation

◆ Course forms part of the Trustee Essentials Certificate

For more information on ASFA Learning courses and to enrol, visit **www.superannuation.asn.au/learning**

Learning pathways

View the pathways below to see where some of our courses can take you.

More information on these courses can be found throughout the guide.

FNS50715 Diploma of Superannuation

A must for anyone serious about a career in superannuation. Well-respected by the industry's employers, this nationally recognised qualification consists of four subjects which focus on all aspects of superannuation.

Enrol in all four subjects upfront and receive a 25 per cent discount.

RG 146 Superannuation ▲ → **Super Admin: Accumulation** ▲ → **Super Admin: Benefits** ▲ → **Super Insurance** ▲ → **Diploma of Superannuation** FNS50715

Trustee Essentials Certificate

This certificate provides you with the training needed to develop, improve and maintain your trustee director knowledge and skills.

The five courses within the certificate can be completed individually or used to build towards the Trustee Essentials Certificate. This can then be combined with professional experience to be certified by the Trustee Director Accreditation Program.

In the Boardroom: Responsibilities and Practice ◆ → **Reporting to the Board** ◆ → **Core Governance for Superannuation** ◆ → **Superannuation Governance Masterclass** ◆ → **Investment Fiduciary Essentials** ◆ → **Trustee Essentials Certificate**

Tailor-made training

Looking for training that fulfils your organisation's specific requirements? The content, duration, and delivery format of our courses can be tailored to meet your goals. We are also able to incorporate organisation-specific examples into the training to make it a perfect fit for you. Throughout the training program, we make sure your staff will be able to relate the content of the course to their job.

As a registered training organisation (RTO), ASFA is able to accredit customised training programs to award your staff with a nationally recognised qualification. You can align your induction program to any number of qualifications that can also then open up opportunities to attract government funding.

Customised training programs allow you to:

» target specific work challenges, projects and groups of staff
» adapt quickly and efficiently to changing market conditions
» train key staff in the areas of most value to your business
» issue staff with a nationally recognised qualification
» access government funding for accredited programs.

For more information, contact ASFA's corporate relations team on 02 8079 0855.

Introductory courses

Super Foundations

An introduction to the Australian superannuation system

Why complete the course?

The technical jargon, legislation and the general complexity of the industry can be overwhelming when you're new to the industry. Super Foundations will give you an understanding of how super works and how the industry operates.

Is this course right for you?

Super Foundations is an ideal course for you if you're new to the super industry, especially if you work in a role related to client services/contact centres, administration, marketing and communications, HR and payroll, or IT/operations. Super Foundations is also a great starting point for new trustees, as it provides a 'big picture' perspective of the industry.

What you'll learn about

- The importance of superannuation in retirement planning
- How the superannuation system works
- The different types of super funds and fund designs
- Governing rules and the role of the trustees
- Different types of superannuation contributions and benefits
- The need for insurance and beneficiary nominations
- Asset classes and risk, and the role of diversification.

What you'll gain

ASFA Certificate of Completion.

How you can learn

Flexible online delivery – start at any time.
Duration: six months.

Pricing (including GST)

	Member	Non-member
Flexible online	$430	$495

6 CPD POINTS

Certificate III in Customer Engagement

A nationally recognised qualification for people who work in contact centres

Why complete the course?

ASFA's Certificate III in Customer Engagement helps people who work in call centres to understand their role in the super industry. It is specially designed for people working in a contact centre environment, going beyond typical customer contact courses to explain contact centre technology and its place in the super and financial services industries through the use of examples and case studies.

Is this course right for you?

Certificate III in Customer Engagement is a great introductory course for all customer service representatives in contact centre roles within the superannuation or financial services industry. It is also a great course for receptionists and front-desk staff.

What you'll learn about

- Effective customer conversations
- Determining and analysing customer needs, including referral to other sources of assistance
- Legislation, policies and procedures that apply to a contact centre in the financial services industry
- Time-management techniques
- Infrastructure and types of technology used in a contact centre
- Developing and maintaining product knowledge
- Successfully escalating a complaint, while maintaining a positive customer relationship
- Signs and sources of stress and fatigue, and techniques to manage them.

How you'll be assessed

Quizzes, online assessments and written projects.

What you'll gain

BSB30215 Certificate III in Customer Engagement, a nationally recognised qualification.

How you'll learn

Two-day, face-to-face corporate workshop. Contact ASFA Learning for pricing.

24 CPD POINTS

Nationally Recognised Training

Certificate IV in Superannuation (ASFA 100)

The industry's benchmark introductory course

Why complete the course?

ASFA Certificate IV in Superannuation, also known as ASFA 100, has been considered the industry's benchmark introductory course for more than 20 years. It is a nationally recognised qualification that will give you a comprehensive introduction to the Australian superannuation system.

Is this course right for you?

It is perfect for you if you are new to the superannuation industry, or want an overview of the operation of the Australian super system.

What you'll learn about

- Government retirement income policy and the compulsory superannuation system
- The history of Australia's superannuation system
- The regulatory framework governing trustees' management of superannuation funds
- The practical and regulatory basis for the administration of a superannuation fund
- Superannuation administration processes
- Types of contributions
- Lump-sum payments and income streams
- Group insurance and claims
- Tax and its effects on superannuation
- Workplace health and safety.

How you'll be assessed

Quizzes, online assessments and written assignments.

What you'll gain

FNS40915 Certificate IV in Superannuation, a nationally recognised qualification.

How you'll learn

Flexible online delivery – start at any time.
Duration: six months.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,250	$1,450

24 CPD POINTS

Nationally Recognised Training

Compliance courses and CPD

RG 146 Superannuation ▲

The industry's premier compliance course

Why complete the course?

RG 146 Superannuation will give you both the generic knowledge and superannuation-specialist knowledge needed for you to give general advice in superannuation, as part of ASIC's RG 146 requirements.

Is this course right for you?

It's ideal for you if you have direct contact with super fund members and are required to be compliant with ASIC's RG 146. RG 146 Superannuation is also beneficial to you if you want to enhance your technical knowledge. RG 146 compliance is highly regarded by industry employers.

What you'll learn about

- How the superannuation system operates
- The legal environment of the financial services industry
- The roles of the government bodies regulating superannuation
- Duties and responsibilities of trustees
- Administrative tasks associated with a super fund
- Types of contributions
- Superannuation benefits: when they can be paid and how they are treated
- The trustees' role in relation to the investment of fund assets
- The main types of financial markets in Australia
- How superannuation is invested
- The impact of economic factors such as inflation, interest rates and government policies on Australia's financial markets
- Social security benefits for retired people
- Planning for retirement.

How you'll be assessed

Quizzes, online assessments and written assignments.

What you'll gain

ASFA Statement of Attainment. This subject forms the first step in obtaining the FNS50715 Diploma of Superannuation, a nationally recognised qualification.

How you can learn

- Flexible online delivery – start at any time
  Duration: six months
- Three-day face-to-face workshop.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,090	$1,260
Public workshop	$1,999	$2,315

24 CPD POINTS

Nationally Recognised Training

Personal Advice: Skills Program

Deliver personal advice with confidence

Why complete the course?

The Personal Advice: Skills Program will enhance the knowledge you have gained from RG 146 Superannuation by providing you with the skills needed to give personal advice to clients in this specialist ASIC knowledge area. If you have also completed Super Insurance, this course will enable you to give personal advice in insurance.

Is this course right for you?

The course is ideal for anyone wanting to enhance their technical knowledge by adding the ability to provide personal advice. This includes client-facing staff, team leaders, advisers and those who have completed ASFA's RG 146 Superannuation and Insurance courses.

What you'll learn about

- The difference between general and personal advice
- Establishing a rapport with clients
- Identifying a client's financial situation, goals, and objectives in seeking advice
- Analysing and agreeing on a client's risk profile
- Developing appropriate strategies
- Providing ongoing services.

How you'll be assessed

- Skills assessment role play
- Online written assessment.

What you'll gain

ASFA Statement of Attainment.

How you'll learn

Flexible online delivery – start any time.
Duration: six months.

Pricing (including GST)

	Member	Non-member
Flexible online	$350	$395

5 CPD POINTS

Nationally Recognised Training

RG 146 Revisited

A refresher course in RG 146

Why complete the course?

RG 146 Revisited is a refresher course in RG 146 for those who may have been out of the industry for some time. It provides you with an overview and update of the basics of providing general advice within superannuation. Updated annually, this course gives you access to the latest RG 146 Superannuation notes, which reflect new legislation, as well as a guide outlining the major changes to the industry.

Is this course right for you?

Have you completed an RG 146 compliance course or been out of the industry for a few years? This is the course for you.

How you'll be assessed

Online quiz.

What you'll gain

ASFA Certificate of Completion.

How you'll learn

Flexible online delivery – start at any time.

Pricing (including GST)

	Member	Non-member
Flexible online	$710	$815

6 CPD POINTS

SuperCPD

ASFA's flagship continuing professional development product

Why subscribe?

SuperCPD is an online continuing professional development (CPD) solution, keeping you up to date with the latest industry developments. It offers you the opportunity to earn at least 20 CPD points a year, making it easier to maintain your compliance.

Published quarterly, SuperCPD offers an engaging learning experience through a combination of text and video content, featuring commentary from some of the industry's leading experts.

Is this right for you?

SuperCPD is a perfect solution for staff who need to maintain their RG 146 compliance, or those who need to satisfy APRA's 'Fit and Proper' test; middle operational management staff, call centre staff and administrators, responsible managers under an Australian financial services licence (AFSL) and responsible officers under a registrable superannuation entity (RSE) licence.

How you'll be assessed

Each edition features at least six assessable topics, offering the opportunity to earn at least 20 CPD points annually.

How you'll learn

Flexible online delivery – start at any time.

Pricing for a 12-month subscription (including GST)

	Member	Non-member
Flexible online	$425	$490

AT LEAST 20 CPD POINTS

Diploma of Financial Planning

Benefit from the combined strength of the leading industry association and a globally renowned academic institution

Why complete the course?

The ASFA-RMIT Diploma of Financial Planning is ideal for anyone wanting to enhance their knowledge of financial planning, client services, financial services, and compliance advisory services as you prepare for a career in financial services.

Is this course right for you?

This course covers a wide variety of knowledge areas and is specifically designed for those working within the superannuation industry and their particular needs.

In addition to the expertise provided by ASFA and RMIT, the program advisory committee includes senior executives from major financial services corporations and professional bodies. The committee provides input and feedback on the design of banking and financial planning programs at RMIT.

What you'll learn about

The ASFA-RMIT Diploma of Financial Planning has been developed for the super industry. It covers the following RG146 tier 1 compliance requirements (also known as knowledge areas):

- Generic knowledge and skill
- Superannuation
- Managed investments
- Life insurance
- Financial planning

You will also learn about developing financial skills in client communication, product research, identifying client needs and developing investment strategies.

How you'll be assessed

- Online multiple choice assessment
- Phone-based role play
- Short answer assessment and case studies
- Produce a Statement of Advice

What you'll gain

ASFA Statement of Attainment for the units completed under RG146 Superannuation and Personal Advice Skills. RMIT will issue a testamur awarding you the FNS50615 - Diploma of Financial Planning, a nationally recognised qualification.

How you can learn

The Diploma of Financial Planning will be delivered online in partnership with RMIT.

Stream A: Enrol in the full Diploma of Financial Planning
This will be delivered in in three clusters.

ASFA will deliver the following programs (covering 6 units of competency) online across 18 weeks in Cluster 1:

- RG 146 Superannuation
- Personal Advice Skills

RMIT will deliver the remainder of the qualification (11 units of competency) in two clusters. Students will have 18 weeks to complete each cluster.

Cluster 2:	Cluster 3:
» Overview of financial services	» Financial advice
» Manage client relationships	» Financial planning skills
» Conduct research analysis	» Provide managed investment advice
	» Conduct complex financial planning research

Total duration of qualification: 12 months (54 weeks)

Stream B
If you have already completed the Diploma of Superannuation or RG 146 Superannuation delivered by ASFA, you will be eligible to receive credit for this training (for cluster 1). You can enrol into Stream B of the Diploma of Financial Planning to fast track your studies. Please contact an ASFA Student Adviser to confirm if you are eligible for a credit transfer.

Pricing (GST exempt)	Member	Non-member
Flexible online (stream A)	$2,500	$3,000
Flexible online (stream B)	$1,850	$2,220

Delivery partner

29 CPD POINTS

Nationally Recognised Training

RMIT UNIVERSITY

Governance and trustee courses

Reporting to the Board ◆

Enabling good decision-making

Why complete the course?

This workshop will arm fund executives and those supporting trustees with the skills to produce informative and succinct reports that facilitate sound decision-making by the board.
Key lessons of this facilitated workshop are further reinforced by a practical case study specifically tailored to the super industry.

Is this course right for you?

This course is ideal for fund executives, senior executives, compliance managers, aspiring trustees and existing trustees who wish to upskill and keep skills current in the new regulatory environment.

What you'll learn about

- The roles and objectives of board reporting
- What boards look for in executive reports
- Capturing information and presenting it succinctly
- Effectively using technology when presenting information.

What you'll gain

Certificate of Attendance. This course also contributes to the Trustee Essentials Certificate.

How you'll learn

Four-hour, face-to-face workshop

Pricing (including GST)

	Member	Non-member
Public workshop	$1,010	$1,160

3 CPD POINTS

Delivered by

AUSTRALIAN INSTITUTE *of* COMPANY DIRECTORS

In the Boardroom: Responsibilities and Practice ◆

Boardroom best practice

Why complete the course?

This four-hour workshop will equip trustee directors with the skills they need to meet their increasing responsibilities and obligations, especially those under the *Corporations Act 2001*. This workshop includes a practical case study specifically tailored to the super industry.

Is this course right for you?

This course is ideal for aspiring trustees, existing trustees who wish to upskill and keep skills current in the new regulatory environment, fund executives and independent directors seeking trustee director appointments.

What you'll learn about

- Key aspects of the *Corporations Act 2001* for board directors
- Board meeting protocols and procedures
- Key functions and responsibilities of the board
- Director liabilities and related protections.

What you'll gain

Certificate of Attendance. This course also contributes to the Trustee Essentials Certificate.

How you'll learn

Four-hour, face-to-face workshop.

Pricing (including GST)

	Member	Non-member
Public workshop	$1,010	$1,160

3 CPD POINTS

Delivered by

AUSTRALIAN INSTITUTE *of* COMPANY DIRECTORS

Core Governance for Superannuation ◆

Enabling delivery of the governance framework

Why complete the course?

Core Governance for Superannuation provides you with a comprehensive overview of the governance framework and the core principles underpinning it: trusteeship and core governance, risk management, investment strategy and insurance strategy.

Is this course right for you?

Core Governance for Superannuation is ideal for trustees and directors, CEOs and senior management staff, governance, compliance and risk professionals, and those who support the board/trustee function, including service providers. This course is also a great introductory course for new trustees as it provides a comprehensive overview of the current governance framework.

What you'll learn about

- The background of the governance framework
- The role and responsibilities of the board, CEO and senior management
- 'Fit and Proper' responsibilities and determining conflicts of interest
- The operational risk financial requirement and what it involves
- Establishing an investment governance framework
- Monitoring investments and reviewing your investment strategy
- Strategy, roles, responsibilities and risks under the insurance management framework
- Select and monitoring insurers
- Setting the right level of insurance for super fund members
- Outsourcing.

What you'll gain

ASFA Certificate of Attendance. This course also contributes to the Trustee Essentials Certificate.

How you'll learn

Four-hour, face-to-face workshop.

Pricing (including GST)

	Member	Non-member
Public workshop	$1,140	$1,310

6 CPD POINTS

Delivery partner

MinterEllison LAWYERS

Superannuation Governance Masterclass ◆

Managing governance in practice

Why complete the course?

The Superannuation Governance Masterclass will help you navigate and implement the new governance framework.

Is this course right for you?

The Superannuation Governance Masterclass is ideal for trustees and directors, CEOs and senior management staff, governance, compliance and risk professionals, and those who support the board/trustee function, including service providers.

What you'll learn about

At each masterclass, Thomson Geer's team of superannuation and wealth management experts will dissect a different area of the framework, or a key governance issue, and use case scenarios and real-life examples to demonstrate how it should best be put into practice, managed and progressed to become 'business as usual'.

What you'll gain

ASFA Certificate of Attendance. This course also contributes to the Trustee Essentials Certificate.

How you'll learn

Three-hour, face-to-face workshop.

Pricing (including GST)

	Member	Non-member
Public workshop	$880	$1,025

3 CPD POINTS

Delivery partner

THOMSON GEER LAWYERS

Governance and trustee courses

Investment Fiduciary Essentials ◆

Global fiduciary best practice

Why complete the course?

Investment Fiduciary Essentials is a one-day workshop designed to help fiduciaries better understand their duties and how to fulfil them, enabling them to always act in the best interest of their members.

Specifically customised for the Australian superannuation market, this workshop covers seven essential best-practice principles that will enable fiduciaries to improve their investment decision-making skills, and help them demonstrate that due process has been followed. Attendees will also receive the *Prudent Practices Handbook*: a reference guide covering 20 practices, tailored to include Australian legal obligations.

Is this course right for you?

This course is ideal for investment professionals, fund executives, aspiring trustees, existing trustees who wish to upskill and keep skills current in the new regulatory environment, and independent directors seeking trustee director appointments.

What you'll learn about

» The roles and responsibilities of a fiduciary
» Laws, regulations and governing documents for fiduciaries
» Crafting an effective investment strategy
» Undertaking effective due diligence and monitoring
» Dealing with conflicts of interest
» A global fiduciary best-practice framework.

What you'll gain

ASFA Certificate of Attendance. This course also contributes to the Trustee Essentials Certificate.

How you'll learn

One-day, face-to-face workshop.

Pricing (including GST)

	Member	Non-member
Public workshop	$1,770	$2,035

6 CPD POINTS

Delivery partner

fi360 Pacific™

ASFA Certificate of Post-retirement

Understanding fund members' post-retirement needs

Why complete the course?

The new ASFA Certificate of Post-retirement is the first of its kind and will provide you with valuable insights into many of the issues surrounding ageing and retirement, and the provision of retirement products to retirees.

Is this course right for you?

Administrators, call centre staff, financial planners and advisors, product managers, relationship managers, marketing and communication specialists, and investment managers will benefit from this course. The course will provide information on all aspects of the post-retirement phase, from retirement planning to the impacts of social security, aged care considerations and estate planning.

What you'll learn

- The changing demographics of the Australian population
- The key challenges facing Australians in the lead up to and during retirement
- The options for structuring member portfolios in the pension phase
- The key features of the available publicly provided and privately provided retirement income products, including the Age Pension and superannuation benefits
- The risks faced in retirement including, longevity risk, inflation risk, interest rate risk, adequacy risk, contingency risk and sequencing risk
- How retirement income-stream products work and protect against longevity risk
- Alternative residential options, aged care and health expenses in retirement, as well as implications for estate planning.

How you'll be assessed

Online quizzes.

What you'll gain

ASFA Certificate of Completion.

How you'll learn

- Flexible online delivery – start at any time
  Duration: six months
- Three-day face-to-face workshop.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,499	$1,725
Public workshop	$2,550	$2,935

18 CPD POINTS

Super Insurance ▲

Understand the relationship between life insurance and superannuation

Why complete the course?

This course explores the design of death and disability benefit structures, how to negotiate suitable insurance policies, and the administrative and decision-making procedures associated with managing member claims. This course will also help advisers gain a better understanding of insurance products, including the benefits of holding insurance within superannuation.

Is this course right for you?

Super Insurance is suitable for life insurance and super product advisers, as well as trustees and their service providers.
This subject meets ASIC's RG 146 initial requirements for general advice in life insurance, when combined with RG 146 Superannuation.

What you'll learn

- Why funds may choose to insure a portion of the death and disablement benefits
- The insurance issues faced by superannuation fund trustees
- Types of death and disablement benefits provided by funds
- Standard features of group insurance cover
- Eligibility criteria for insurance cover
- Common features of income protection insurance
- The different insurance approaches for part-time, casual employees and employees on leave
- The due diligence process for appointing a new insurer
- Insurance-related disclosure requirements
- The general underwriting procedures, and the events that lead to underwriting
- The process of an insurance review
- How insurance premiums are calculated and collected
- The procedures involved in the assessment of death and disablement benefits
- Internal and external dispute resolution procedures.

How you'll be assessed

Quizzes, online assessments and written assignments.

What you'll gain

ASFA Statement of Attainment. This subject forms part of the FNS50715 Diploma of Superannuation, a nationally recognised qualification, and meets the ASIC requirements for RG 146 insurance knowledge.

How you'll learn

Flexible online delivery – start at any time.
Duration: six months.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,090	$1,260

24 CPD POINTS

Nationally Recognised Training

Specialist courses

Super Admin: Accumulation ▲

Learn how to help fund members grow their super

Why complete the course?

This course focuses on the rules and processes that you need to understand in order to support fund members as they grow their superannuation with contributions and earnings. Taking an operations perspective, it provides an in-depth explanation of the legislative requirements and tax treatment of contributions.

Is this course right for you?

This is the perfect course for superannuation administrators, administration team leaders and managers. It is also a great option for contact centre staff looking to expand their career options, and those seeking to expand their knowledge of administrative policies and procedures.

What you'll learn

» The activities involved in the administration of super funds during the accumulation phase
» Industry issues from the superannuation system review
» The different fund arrangements within the super industry
» Admitting new members to the fund
» How contributions can be made to a fund
» The process for handling rollovers
» The different types of fees and deductions
» Inquiry, complaint and how contact centres handle inquiries
» The minimum requirements for superannuation funds in reporting to members.

How you'll be assessed

Quizzes, online assessments and written assignments.

What you'll gain

ASFA Statement of Attainment. This subject forms part of the Certificate of Superannuation Administration and FNS50715 Diploma of Superannuation. The Diploma of Superannuation is a nationally recognised qualification.

How you'll learn

Flexible online delivery – start at any time.
Duration: six months.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,090	$1,260

24 CPD POINTS

Nationally Recognised Training

Super Admin: Benefits ▲

Learn how to assist fund members to access their superannuation benefits

Why complete the course?

The partner subject to Super Admin: Accumulation, this course explores the rules and processes involved in assisting fund members access their superannuation benefits to support their retirement through rollovers, lump sums or retirement income streams. Super Admin: Benefits provides an in-depth explanation of the legislative requirements and tax treatment of benefit payments, including both lump sums and pensions.

Is this course right for you?

It is the ideal next step for people who have completed Super Admin: Accumulation. It is also suitable for superannuation administrators working specifically in the benefits/drawdown area of businesses.

What you'll learn

» How Australia's retirement income system operates and issues related to adequacy
» The main activities involved in the administration of super funds during the benefit payment phase
» Benefit payment processes, including death and disablement benefits
» Types of insurance and insurance claims
» The role of the administrator in dealing with retirement income streams
» Legal requirements for trustees of super funds regarding reporting to members
» Procedures to be followed in relation to the division of super assets on the breakdown of a marriage
» Year-end tasks for the administrator
» Requirements and processes for dealing with complaints.

How you'll be assessed

Quizzes, online assessments and written assignments.

What you'll gain

ASFA Statement of Attainment. This subject forms part of the Certificate of Superannuation Administration and FNS50715 Diploma of Superannuation. The Diploma of Superannuation is a nationally recognised qualification.

How you'll learn

Flexible online delivery – start at any time.
Duration: six months.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,090	$1,260

24 CPD POINTS

Nationally Recognised Training

Defined Benefits

For people working at or with employer-sponsored funds

Why complete the course?

ASFA's Defined Benefits is directly aimed at people working in traditional employer-sponsored funds. It provides valuable insight into the key issues to be considered in the design process, and the benefits these types of funds provide. This course also compares and contrasts defined benefit funds (DBFs) with accumulation and hybrid-style funds.

Is this course right for you?

This course is ideal for defined benefit specialists, trustees and administrators responsible for managing/overseeing traditional employer-sponsored funds. Also ideal for those who work with employer-sponsored funds.

What you'll learn

- The features of a DBF, and its advantages and disadvantages
- Different funding arrangements for DBFs
- Factors affecting retirement, resignation, retrenchment, death and disablement benefit design
- The arrangements for part-time and casual employees, and employees on leave
- The issues associated with public sector DBFs
- The steps involved in an actuarial investigation of the fund
- Contributions to DBFs
- Retirement benefits offered by DBFs
- The role of an actuary and the type of information provided in an actuarial report
- How to transfer benefits between funds
- How to calculate liabilities and valuing assets
- How to analyse, interpret and report results
- Issues involved in the merge or winding up of a fund.

How you'll be assessed

Quizzes, online assessments and written assignments.

What you'll gain

ASFA Certificate of Completion

How you'll learn

Flexible online delivery – start at any time.
Duration: six months.

Pricing (GST exempt)

	Member	Non-member
Flexible online	$1,090	$1,260

24 CPD POINTS

Accredited Aged Care Professional™

Learn how to develop aged care advice solutions for clients

Why complete the course?

The Accredited Aged Care Professional™ program is designed to give financial advisers the knowledge and skills to be able to provide specialist aged care advice to their clients. This program will give advisers the confidence to build and present various strategies to allow their clients to make an informed decision.

Is this course right for you?

This course is ideal for anyone wanting to enhance their knowledge of aged care and especially those providing advice in this specialised and ever growing area.

What you'll learn about

- The aged care industry
- Aged accommodation choices
- Centrelink and Veterans' Affairs
- A deeper understanding of fees and what is happening in practice within the care industry
- The steps for creating advice solutions
- Understanding negotiations with aged care facilities

How you'll be assessed

Online multiple choice assessment.
Short answer assessment and case studies

What you'll gain

An accreditation certificate will be supplied to you upon successful completion of all three modules.

How you'll learn

Module 1: Aged Care Essentials (5 online modules)
Completion of all components (including quizzes) is recommended before attending the Strategic Advice Steps module and is compulsory for accreditation.

Module 2: Strategic Advice Steps (full day workshop)

Module 3: Advice in Practice (full day workshop)
It should be noted that attendees cannot attend the Advice in Practice workshop unless they have completed the Strategic Advice Steps workshop.

Pricing (GST exempt)

	Member	Non-member
Strategic Advice Steps (this includes access to the Aged Care Essentials online modules as pre-reading)	$1,024	1,330
Advice in Practice	$760	$990

18 CPD POINTS

Delivered by

AGED CARE STEPS

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