

# 2025 Course Guide

asfa  
LEARNING



PATHWAY TO KNOWLEDGE



# For the industry, by the industry



**Mary Delahunty**  
ASFA CEO

It is my pleasure to introduce you to the ASFA Learning Course Guide for 2025 – an overview of our learning opportunities designed to inspire, educate, and empower those shaping Australia’s superannuation landscape.

For over 60 years, ASFA has been at the centre of policy, research and advocacy for our nation’s superannuation industry. Our membership spans the entire sector – retail, profit to member/industry, corporate, and public-sector funds, along with the many service providers who play such a vital role in supporting our world leading system.

ASFA Learning has been your trusted superannuation education specialists since 1990. For over three decades, we’ve partnered with the industry’s most respected organisations to provide their teams with tailored, high-quality training. Whether it’s through online courses, CPD products, public and corporate workshops or customised solutions, we ensure our programs are practical, relevant and ready to meet the needs of our industry.

“ASFA Learning is your pathway to knowledge, designed for the industry, by the industry. Together, we’ll ensure you and your organisation are ready to thrive in the ever-evolving world of superannuation.”

Superannuation is a complex and ever-evolving field, presenting unique challenges that demand continuous learning and development. We understand that choosing the right course or deciding on the next steps in your professional growth can feel overwhelming on the journey of lifelong learning. That’s why ASFA’s experts are always on hand to guide you in taking the next step, whatever your goals may be, ensuring your learning journey is tailored to the unique needs of the superannuation industry.

ASFA Learning’s courses are designed **for the industry, by the industry**. They tackle the challenges and changes that matter most to you, offering insights that are grounded in the expertise of ASFA’s policy and technical specialists. Through our learning offerings, you’ll gain the confidence to deliver for your members, armed with the latest technical knowledge and industry best practices.

We look forward to supporting you and your organisation on your **pathway to knowledge**.

A handwritten signature in black ink, appearing to read 'Mary Delahunty'. The signature is fluid and cursive.

**Mary Delahunty**  
ASFA CEO

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# Who is ASFA

The Association of Superannuation Funds of Australia (ASFA) has been operating since 1962 and is the peak policy, research and advocacy body for Australia's superannuation industry.

**ASFA is the voice of super.**

We unite the superannuation community, supporting our members with research, advocacy, education and collaboration to help Australians enjoy a dignified retirement.

We promote effective practice and advocate for efficiency, sustainability and trust in our world-class retirement income system.



PATHWAY TO KNOWLEDGE

# Why study with ASFA Learning

ASFA Learning is a Registered Training Organisation (RTO ID 90755) that has been leading superannuation education since 1990 – the superannuation industry’s longest running and most trusted training provider. Whether you are new to the industry, looking to advance your career, or at the most senior level within the industry, ASFA Learning is here to support you on your pathway to knowledge.

Decades of experience in superannuation, training, education and compliance, as well as a strong strategic focus developing agile digital products, allows us to provide a best-in-class learning experience. As we’re immersed in superannuation, we’re close to the ‘action’ and can provide specialist insights and in-depth expertise.

Customised training solutions are also available, allowing member organisations to design training that suits their unique needs. ASFA Learning works with some of the industry’s most respected organisations to train their staff via corporate workshops and customised training solutions.



“We’ve partnered with ASFA for several years to deliver superannuation education across our member services operations. Their high-quality online education programs and support services have been instrumental in helping us meet the evolving needs of our members.”

Peter Hogg  
GM, Advice  
Aware Super

-  Superannuation Specialists
-  Interactive eLearning
-  ASFA Policy Team Knowledge
-  Multiple Learning Formats
-  Industry Leading Workshops & Courses

## Learning Key Stats 2023 / 2024

3,100+



superannuation professionals provided with world-class superannuation education via workshops, courses, or SuperCPD

1,300+

people attended a workshop

950+

active SuperCPD subscribers

150+

organisations engaged ASFA Learning

# How ASFA Learning can help your organisation

ASFA Learning offers superannuation-specific training — designed for the industry, by the industry.

## Online learning — study anywhere, anytime

The majority of ASFA Learning’s superannuation courses and CPD solutions are available in online formats. This puts training from the industry’s leading superannuation educator at your fingertips anywhere, anytime and on any device.

## Public virtual workshops

ASFA’s virtual workshops are a live and interactive learning experience. Participants can engage with industry-leading presenters who are experts in their field, together with their peers, just like they would at an ASFA face to face workshop. It is a unique opportunity to workshop ideas and concepts in a collaborative online environment facilitated by experts.

## Public face to face workshops

ASFA Learning runs regular face-to-face workshops around Australia for RG 146 Superannuation, as well as Superannuation Governance Masterclasses on key governance issues. Expert trainers use practical case scenarios and real-life examples to provide you and your team with relevant takeaways to implement immediately.

## Consultancy services

We can partner with your organisation to implement best-practice professional development solutions that suit you.

## Corporate workshops

ASFA Learning can deliver any of its courses as a corporate workshop, whenever and wherever suits your organisation.

## Bespoke professional development

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

## Here are some ways we’ve helped organisations:



Provided content, facilitation and eLearning modules for induction programs



Delivered bespoke workshops on topical issues



Conducted RG 146 Super Reviews of member facing representatives



Provided a live and interactive version of our SuperCPD online CPD product



Developed custom designed eLearning modules

# Learning formats that suit you

ASFA Learning's courses are delivered in a range of formats to suit any learning needs and allow you to choose your preferred learning style.



### Flexible Online

Online learning that can be accessed on any device that has internet access, so you can study in the office, at home, or while traveling to and from work at a time and pace that suits you.



### Corporate Workshop (in-house) — face-to-face or virtual

Private delivery in a location that suits you. Led by industry leading facilitators with relevant expertise and tailored to your business.



### Virtual Workshops

An ASFA virtual workshop is an interactive live learning experience. Participants can engage with expert industry-leading presenters, together with their peers, just like they would at an ASFA face-to-face workshop. It is a unique opportunity to workshop ideas and concepts in a collaborative online environment facilitated by experts. A limit of 30 participants allows for discussion, and ensures that participants have ample opportunity to ask presenters questions.



### Public Workshop — face-to-face

An ASFA face-to-face workshop is for those who prefer to learn face-to-face with expert trainers and network with industry peers. Classroom learners receive comprehensive supplementary notes, factsheets, and reference material for each course.



### Blended Learning

For corporate groups only — ASFA's courses are flexible enough to be delivered in a blended format with a combination of face-to-face or virtual workshop complemented by interactive eLearning modules.

Contact ASFA Learning for further information on blended learning solutions.



Student advisors available Monday to Friday 9am—5pm



Comprehensive support via phone and email



Access to course materials online

## All learners can get assistance via:

# Choose the course that is right for you or your team

## Step 1: Identify your learning level

| Level   |   |  |
|---|---|--|
| Strategic   | Execution   | Support  |
| <p><b>Role:</b> Sets the strategy and direction of the organisation.</p> <p><b>Who:</b> Trustees, Directors, Alternate Directors.</p> | <p><b>Role:</b> Implement strategy, leads the organisation, functional managers.</p> <p><b>Who:</b> CEO, Senior Management, Risk and compliance, Product Managers, those who support the board / trustee function, Legal.</p> | <p><b>Role:</b> Support the organisation and members.</p> <p><b>Who:</b> Member-facing, Administration, Complaints handling teams, Marketing and communications, Sales, Operations, IT, Relationship Managers.</p> |

## Step 2: Choose your course

| Course  | Strategic | Execution | Support       |                 |
|---|-----------|-----------|---------------|-----------------|
|   |           |           | Member-facing | Admin functions |
| Superannuation Governance Masterclass           | ✓         | ✓         |               |                 |
| SuperCPD Trustee                                | ✓         | ✓         |               |                 |
| SuperReg  | ✓         | ✓         |               |                 |
| Super Professional                              | ✓         | ✓         |               |                 |
| RG 146 Superannuation                           |           |           | ✓             | ✓               |
| RG 146 Superannuation Refresher                 |           |           | ✓             | ✓               |
| SuperCPD  |           |           | ✓             | ✓               |
| General Advice Skills Program                   |           |           | ✓             |                 |
| Factual information vs Financial Product Advice |           |           | ✓             |                 |
| Super Essentials                                | ✓         | ✓         | ✓             | ✓               |
| Benefits Essentials                             |           |           |               | ✓               |
| Death Benefits Claims Handling Essentials       |           |           | ✓             | ✓               |
| Contributions Essentials                        |           |           |               | ✓               |
| Insurance Essentials                            |           |           | ✓             | ✓               |
| Internal Dispute Resolution Essentials          |           |           | ✓             | ✓               |
| Investment Essentials                           | ✓         | ✓         | ✓             | ✓               |
| Retirement Essentials                           |           |           | ✓             | ✓               |
| Certificate IV in Superannuation                |           |           |               | ✓               |
| RG 146 Super Reviews                            |           |           | ✓             |                 |



# Superannuation Governance Masterclass

|            |                      |
|------------|----------------------|
| Level      | Strategic, Execution |
| CPD Points | 3                    |
| Duration   | 3 hours              |

## Managing governance in practice.

A series of intensive, classroom-style masterclasses designed to help the leaders of the superannuation industry achieve governance best practice.

## Flexible learning formats



Public Workshop



Corporate Workshop

### Learning outcomes

Masterclass is a unique opportunity to workshop obligations and implementation issues in a collaborative environment facilitated by experts. At each Masterclass, a team of industry 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'.

### Suitable for

Masterclass is for the leaders of the superannuation industry:

- trustees and directors
- CEOs, and senior management staff
- governance
- compliance and risk professionals
- those who support the board / trustee function.

### Previous Delivery Partners



## Pricing (incl. GST)\*

### Public Workshop

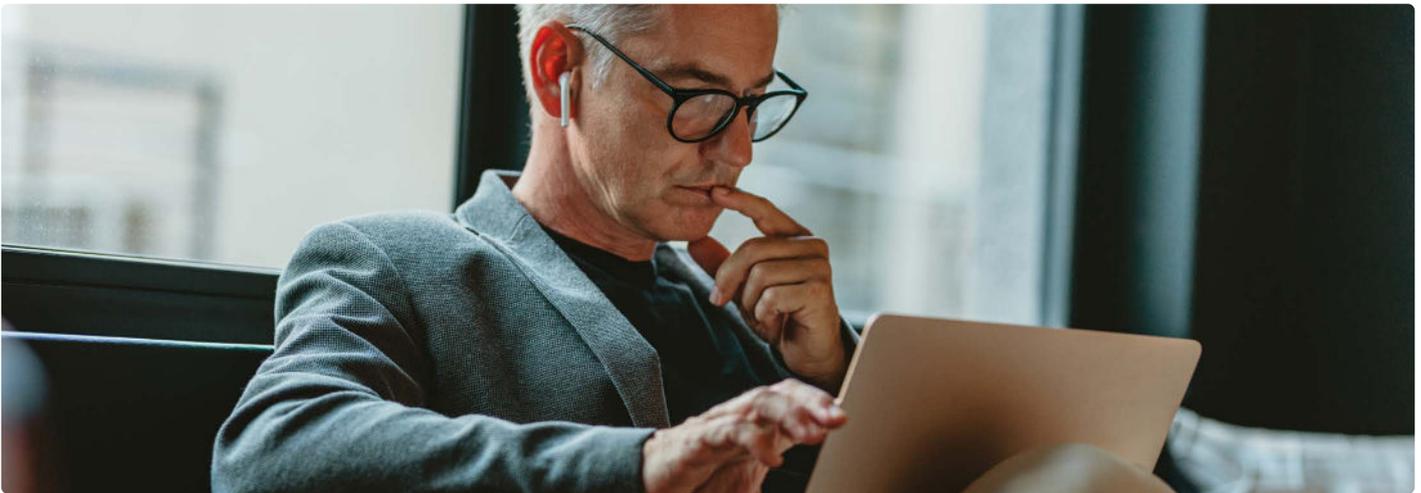
Member: \$880  
Non-member: \$1,025

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# SuperCPD Trustee

|                   |                       |
|-------------------|-----------------------|
| <b>Level</b>      | Strategic, Execution  |
| <b>CPD Points</b> | Up to 20 annually     |
| <b>Duration</b>   | 12-month subscription |

ASFA’s online continuing professional development (CPD) solution purpose built for superannuation trustees.

SuperCPD Trustee is designed and delivered by leading industry experts, and the only structured online CPD solution designed specifically for superannuation trustees.

## Flexible learning formats



### Learning outcomes

Learning outcomes will vary across topics per edition. SuperCPD Trustee is a simple way for trustees to satisfy APRA’s “fit and proper” obligations. It is an online professional development solution that allows trustees to stay up to date with the latest industry developments and earn up to 20 CPD points a year, with access to around 20 hours of content annually.

### Suitable for

SuperCPD Trustee is purpose-built and designed for superannuation trustees and alternate trustees / directors. It addresses the specific obligations of superannuation trustees and provides knowledge and skills to meet those obligations. It is also suitable for responsible managers under an AFSL and responsible officers under an RSE licence, as well as CEOs, Managing Directors, Business Heads, and those supporting the trustee function.

## Pricing (incl. GST)\*

**Pricing for a 12-month subscription:**

### Flexible Online

Member: \$495  
Non-member: \$570

[Click to Enrol Now](#)

\* Please refer to ASFA’s Fees and Refunds Policy and Procedure which outlines ASFA’s approach to managing fees and refunds.



# SuperReg

|                   |                       |
|-------------------|-----------------------|
| <b>Level</b>      | Strategic, Execution  |
| <b>CPD Points</b> | Up to 10 annually     |
| <b>Duration</b>   | 12-month subscription |

## Stay informed, stay compliant.

SuperReg is the convenient way for superannuation leaders to receive regulatory change updates directly from legal experts. Receive email reminders and then simply log in to the ASFA Learning Hub to access regular video updates throughout the year. Anywhere, anytime, on any device.

## Flexible learning formats



Flexible Online

### Learning outcomes

SuperReg offers on-demand video updates that provide critical insights into the impacts of current and upcoming regulatory changes for trustees and senior executives. Specifically designed for those in senior governance roles, and their supporting legal teams, these updates will support trustee directors and senior leaders to oversee regulatory change programs and understand the strategic risks and opportunities they present.

### Suitable for

SuperReg is purpose-built for superannuation trustees and senior executives. It addresses the specific obligations of these key roles and provides essential knowledge and skills to help meet those obligations.

It is also suitable for internal legal teams, responsible managers under an AFSL and responsible officers under an RSE licence, as well as those supporting the trustee function.

## Pricing (incl. GST)\*

**Pricing for a 12-month subscription:**

### Flexible Online

Member: \$795  
Non-member: \$995

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Super Professional

## Super training to help you get ahead.

Presented by leading industry experts, these engaging and practical virtual workshops will keep you abreast of current issues and new legislation.

## Flexible learning formats



Virtual Workshop



Corporate Workshop

### Learning outcomes

Super Professional is a series of 1-hour virtual workshops that allow functional managers and leaders to quickly enhance their personal effectiveness, become a subject matter expert and be seen as an 'up and comer' in their organisation. It provides participants with the practical skills and knowledge to excel in their chosen areas of technical expertise by delivering topical, practical, expert-led learning.

### Suitable for

Super Professional is for functional managers and leaders of the superannuation industry:

- trustees and directors
- CEOs, and senior management staff
- business heads
- governance
- compliance and risk professionals
- those who support the board / trustee function.

|                   |                      |
|-------------------|----------------------|
| <b>Level</b>      | Strategic, Execution |
| <b>CPD Points</b> | 1                    |
| <b>Duration</b>   | 1 hour               |

## Pricing (incl. GST)\*

### Public Workshop

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# RG 146 Superannuation

The superannuation industry's premier compliance course.

Designed specifically for the superannuation industry, RG 146 Superannuation satisfies the ASIC requirements for the provision of general advice in superannuation.

## Flexible learning formats



Flexible Online



Virtual Workshop



Public Workshop



Corporate Workshop



Blended Learning

### Learning outcomes

ASFA's RG 146 Superannuation course is the industry leading and most flexible RG 146 course available in the market. Designed specifically for the superannuation industry, it satisfies the ASIC requirements for the provision of general advice in superannuation. It is updated annually to ensure its content remains current and incorporates any legislative changes.

It comprises nine modules covering:

- what makes up the super industry and how it operates
- governance, legislation and regulation of the super industry and the responsibilities of trustees
- types of contributions
- how super is invested and the trustees' role in investing
- insurance in super
- super benefits and when they can be paid
- member communications, types of advice, and internal and external dispute resolution requirements
- the main types of financial markets in Australia and the impact of economic factors and government policies
- planning for retirement and the Age Pension.

### Suitable for

ASFA's RG 146 Superannuation is ideal for experienced industry professionals wanting to build on their technical knowledge or those needing to engage directly with super fund members.

|                   |                  |
|-------------------|------------------|
| <b>Level</b>      | Support          |
| <b>CPD Points</b> | 20               |
| <b>Duration</b>   | Approx. 20 hours |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$799  
Non-member: \$925

### Virtual Workshop

Member: \$1,200  
Non-member: \$1,480

### Public Workshop

Member: \$1,499  
Non-member: \$1,735

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



"ASFA RG 146 provides us with the ability to easily skill our people in the necessary legislative requirements for the work they do... [and the] new flexible eLearning program has allowed us to segment our training to fit around internal requirements."



# RG 146 Superannuation Refresher

## Refresh your industry knowledge.

A quick, convenient way to keep up to date with the latest changes to the super industry and help maintain your RG 146 compliance in super.

## Flexible learning formats



Flexible  
Online



Virtual  
Workshop



Corporate  
Workshop

### Learning outcomes

ASFA's RG 146 Superannuation Refresher recaps the key points from RG 146 and provides an update of any new legislation or industry changes. By completing this course, you will get an update on any changes that impact the RG 146 superannuation specialist knowledge areas including:

- operation and management of the superannuation industry
- taxation
- legal environment — disclosure and compliance.

### Suitable for

RG 146 Superannuation Refresher has been developed specifically for people who are already RG 146 compliant in super. It is also suitable for anyone in need of a super industry refresher course.

|            |                 |
|------------|-----------------|
| Level      | Support         |
| CPD Points | 4               |
| Duration   | Approx. 4 hours |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$395  
Non-member: \$455

### Virtual Workshop

Member: \$395  
Non-member: \$455

### Classroom Corporate Learning

Corporate prices upon application

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\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# SuperCPD

## ASFA's flagship online continuing professional development (CPD) product.

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.

### Flexible learning formats



Flexible  
Online

#### Learning outcomes

Learning outcomes will vary across topics per edition. SuperCPD is a simple way to stay up to date with the latest super industry developments. It offers the opportunity to earn at least 20 CPD points a year, making it easier to maintain compliance.

#### Suitable for

SuperCPD is suitable for all superannuation professionals, from administration to management level. It is especially ideal for:

- anyone who needs to maintain their RG 146 compliance
- middle operational management, call centre staff and administrators
- responsible managers under an AFSL and responsible officers under an RSE licence.

|                   |                       |
|-------------------|-----------------------|
| <b>Level</b>      | Support               |
| <b>CPD Points</b> | Up to 20 annually     |
| <b>Duration</b>   | 12-month subscription |

### Pricing (incl. GST)\*

#### Pricing for a 12-month subscription:

##### Flexible Online

Member: \$495  
Non-member: \$570

[Click to Enrol Now](#)

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# General Advice Skills Program

|            |                 |
|------------|-----------------|
| Level      | Support         |
| CPD Points | 6               |
| Duration   | Approx. 6 hours |

## Take your general advice from good to great.

If you are already RG 146 compliant and certified to provide general advice in superannuation, the General Advice Skills Program is designed to give you everything you need to deliver effective general advice in super; the knowledge, the skills and the confidence. For those not yet RG 146 compliant and certified to provide general advice in super, you should first complete ASFA's RG 146 Superannuation course.

## Flexible learning formats



Flexible Online



Virtual Workshop



Corporate Workshop

### Learning outcomes

By completing this course, it is expected that learners will be able to display a knowledge and understanding of the following areas:

- the differences between personal advice, general advice and factual information
- the Australian Financial Services Licence requirements for providing advice
- how to comply with conduct and disclosure obligations
- how to provide useful, relevant and accurate general advice in super
- general advice boundaries and how to minimise risks and avoid compliance breaches when providing advice
- how to select and use effective communication strategies when dealing with clients
- how to confidently speak to clients and members using active listening and effective questioning skills
- strategies for retaining members
- the importance of propriety and professionalism when providing advice.

### Suitable for

General Advice Skills Program has been specifically designed for front-facing staff who provide information or financial product advice directly to clients, such as:

- contact centre staff
- relationship managers, or other staff responsible for running educational seminars for super fund members
- sales and marketing team members.

## Pricing (incl. GST)\*

### Flexible Online

Member: \$495  
Non-member: \$570

### Virtual Workshop

Member: \$495  
Non-member: \$570

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Factual Information vs Financial Product Advice

An interactive and engaging online course on how to provide useful, relevant and accurate factual information without crossing the line.

Good quality factual information can often be useful for members wishing to better understand the financial products or strategies available to them.

## Flexible learning formats



Flexible  
Online



Virtual  
Workshop



Corporate  
Workshop

### Learning outcomes

By completing this course, it is expected that learners will be able to display a knowledge and understanding of the following areas:

- factual information and financial product advice, and the differences between them
- the differences between general and personal financial product advice
- how to provide useful, relevant and accurate factual information whilst avoiding providing financial product advice when you are not licensed to do so
- factual information boundaries and how to minimise risks and avoid compliance breaches.

### Suitable for

This course will suit anyone who wants to learn what it takes to deliver effective factual information without breaching AFSL requirements by providing financial product advice when not authorised to do so. It is designed specifically for front-facing support staff who provide information directly to members, such as:

- contact centre staff
- relationship managers
- staff responsible for running educational seminars for super fund members
- sales and marketing team members.

|            |                |
|------------|----------------|
| Level      | Support        |
| CPD Points | 1              |
| Duration   | Approx. 1 hour |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Virtual Workshop

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Super Essentials

|                   |                               |
|-------------------|-------------------------------|
| <b>Level</b>      | Strategic, Execution, Support |
| <b>CPD Points</b> | 3.5                           |
| <b>Duration</b>   | Approx. 3.5 hours             |

For a concise overview of the Australian superannuation system anywhere, anytime.

The technical jargon, constantly changing legislation, and the general complexity of the superannuation industry can be overwhelming. ASFA's Super Essentials course demystifies super and is ideal for anyone working in the super industry or in any related field.

## Flexible learning formats



Flexible  
Online



Virtual  
Workshop



Corporate  
Workshop

### Learning outcomes

Super Essentials provides an understanding of how super and the industry work. Upon completion it is expected learners will be able to display a knowledge and understanding of the following areas:

- the importance of superannuation and how the super system works
- the different types of super funds and industry structures
- the legislation and regulation governing the super industry
- the different types of super contributions
- how superannuation money is invested
- how insurance is provided through super
- types of benefits and conditions of release.

### Suitable for

Whether you're new to the industry, needing to understand how super works, or in a senior role requiring a quick refresher, Super Essentials is a great resource. Anyone working in a superannuation role will benefit from learning about the industry, including client services/contact centres, administration, marketing and communications, HR and payroll, IT / operations and trustees.

## Pricing (incl. GST)\*

### Flexible Online

Member: \$495  
Non-member: \$570

### Virtual Workshop

Member: \$495  
Non-member: \$570

### Classroom Corporate Learning

Corporate prices upon  
application

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# Benefits Essentials

|                   |                 |
|-------------------|-----------------|
| <b>Level</b>      | Support         |
| <b>CPD Points</b> | 2               |
| <b>Duration</b>   | Approx. 2 hours |

This quick, convenient course teaches you how members and (in the case of death) their dependants receive money out of superannuation in the form of benefits.

Benefits Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible Online

### Learning outcomes

In as little as two hours, this course provides you with all the essential knowledge of superannuation benefits, including the SIS conditions of release, the administration procedures and paperwork in respect of paying superannuation benefits, rollovers, the different ways people can provide for their retirement through retirement income streams, Transition to Retirement (TTR) arrangements, the payment of death and disability benefits, and the tax applicable on lump sums taken out of superannuation.

### Suitable for

Benefits Essentials will suit individuals in, or aspiring to work in, administrative or specialist roles within superannuation funds or service providers to the superannuation industry who require an understanding of the key area of superannuation benefits.

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

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# Death Benefits Claims Handling Essentials

The assessment of death claims is a source of a significant proportion of complaints from superannuation fund members and an area of focus for the regulators. This quick, convenient course provides a comprehensive understanding of the death claims assessment process, including claims handling principles and best practice, as well as the skills required to handle difficult interactions with beneficiaries.

Death Benefits claims Handling Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible Online

### Learning outcomes

In as little as one hour, this course provides a comprehensive understanding of the death benefits claims assessment process, including death benefits claims handling principles and best practice, and the skills required to handle difficult customer interactions.

### Suitable for

Death Benefits Claims Handling Essentials will suit individuals in or aspiring to work in claims handling roles or specialist death benefits administration roles within superannuation funds or service providers to the superannuation industry.

|            |                |
|------------|----------------|
| Level      | Support        |
| CPD Points | 1              |
| Duration   | Approx. 1 hour |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Contributions Essentials

|            |                 |
|------------|-----------------|
| Level      | Support         |
| CPD Points | 2               |
| Duration   | Approx. 2 hours |

This quick, convenient course teaches you all about the critical area of superannuation contributions.

Contributions Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible  
Online

### Learning outcomes

In as little as two hours, this course provides you with an overview of the different types of contributions that can be made to a superannuation fund, the various caps that these contributions are subject to, how those contributions are taxed (including how excess contributions are treated), who can make contributions into a superannuation fund and the requirements to be eligible for the Government co-contribution, Low Income Superannuation Tax Offset (LISTO), First Home Super Saver Scheme (FHSSS) and downsizer contributions, as well as the electronic processing of superannuation contributions.

### Suitable for

Contributions Essentials will suit individuals in, or aspiring to work in, administrative or specialist roles within superannuation funds or service providers to the superannuation industry who require an understanding of the key area of superannuation contributions.

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Insurance Essentials

This quick, convenient course teaches you all about the essential area of insurance in superannuation.

Insurance Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible Online

### Learning outcomes

In as little as one hour, this course outlines the role of insurance, the different types of insurance cover available to members of superannuation funds, the key benefits of group life insurance arrangements, the duty of disclosure imposed upon members, the role of the insurer and the different methods used to calculate a member's insurance premium, as well as the more recent amendments to insurance under the Protecting your Superannuation and Putting Members' Interests First legislation.

### Suitable for

Insurance Essentials will suit individuals in, or aspiring to work in, insurance teams, claims handling roles or specialist insurance roles within superannuation funds or service providers to the superannuation industry.

|                   |                |
|-------------------|----------------|
| <b>Level</b>      | Support        |
| <b>CPD Points</b> | 1              |
| <b>Duration</b>   | Approx. 1 hour |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Internal Dispute Resolution Essentials

This quick, convenient course teaches you all about the essential function of Internal Dispute Resolution. It is designed to train staff on handling member complaints and to help satisfy ASIC's complaint handling requirements.

Internal Dispute Resolution Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible  
Online

### Learning outcomes

Since RG 271 Internal dispute resolution came into effect on 5 October 2021, ASIC requires staff who deal with complaints to have the knowledge, skills and attributes to effectively perform their roles. This interactive online course covers the theory and legislative requirements of RG 271 in order to support you or your staff when handling member complaints.

In as little as one hour, this course provides a comprehensive overview of the internal dispute resolution process, together with dispute resolution techniques for managing complaints, and looks at the issues that superannuation fund trustees and administrators need to consider, including documenting procedures, collecting and reporting data, and confidentiality.

### Suitable for

This course will suit all staff within superannuation funds or service providers to the superannuation industry as per ASIC's RG 271 requirement of "providing training to all staff, not just complaints management staff, about the IDR process" (RG 271.132). It is especially designed for:

- front line complaints handling staff
- staff dealing with escalated complaints.

|            |                |
|------------|----------------|
| Level      | Support        |
| CPD Points | 1              |
| Duration   | Approx. 1 hour |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Investment Essentials

|            |                 |
|------------|-----------------|
| Level      | Support         |
| CPD Points | 2               |
| Duration   | Approx. 2 hours |

This quick, convenient course teaches you the fundamentals of investment of superannuation assets.

Investment Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible  
Online

### Learning outcomes

In as little as two hours, this course provides an overview of the factors affecting investment decisions by superannuation funds, the SIS requirements and constraints imposed on trustees when investing a superannuation fund's assets, key investment concepts, such as risk and return and their importance and relevance, the various financial markets, the categories of assets and the impact of return, risk, liquidity, and tax on each of the four major asset classes, and alternative investments, derivatives and international investments.

### Suitable for

This course will suit experienced industry professionals keen to build on their technical knowledge of investments, those needing to engage directly with investment managers or teams, together with board members requiring a detailed understanding of investing superannuation.

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# Retirement Essentials

|            |                 |
|------------|-----------------|
| Level      | Support         |
| CPD Points | 2               |
| Duration   | Approx. 2 hours |

This quick, convenient course teaches you all about the fundamental area of helping members plan for retirement.

Retirement Essentials is delivered completely online in an interactive e-learning format comprising one e-learning module and a final quiz. Online delivery means you can study anywhere, anytime.

## Flexible learning formats



Flexible  
Online

### Learning outcomes

In as little as two hours, this course outlines the various stages of retirement planning, eligibility for the Age Pension, Age Pension entitlements, some of the other benefits that assist senior Australians, and the interaction between the social security and superannuation systems through the social security treatment of superannuation assets and income streams.

### Suitable for

Retirement Essentials will suit individuals in, or aspiring to work in, member facing or specialist roles within superannuation funds or service providers providing retirement advice or solutions to members.

## Pricing (incl. GST)\*

### Flexible Online

Member: \$195  
Non-member: \$250

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# FNS40920 Certificate IV in Superannuation

The super industry's premier introductory administration course for over 20 years (formerly known as ASFA 100).

Provides a comprehensive outline of superannuation administration.

## Flexible learning formats



Flexible  
Online

### Learning outcomes

ASFA's Certificate IV in Superannuation (FNS40920) is a nationally recognised qualification that covers a range of administrative related topics such as assisting with meeting industry compliance requirements, administering income streams, processing contributions, establishing and maintaining employer accounts and processing benefits, claims and payments.

### Suitable for

This course will suit individuals in, or aspiring to work in, administrative or specialist roles within superannuation funds or service providers to the superannuation industry. It is also a great course for new employees in professional and management roles to undertake before they commence work in the super industry.

Designed for individuals who want to work in customer service and administration roles within superannuation such as:

- fund administrator
- superannuation contact centre administrator
- superannuation contact centre operator
- customer service officer
- member service consultant.

### Enrolment

To enrol or for further information including entry requirements, units of competency, and how you'll be assessed, click the enrol now button.

|            |           |
|------------|-----------|
| Level      | Support   |
| CPD Points | 24        |
| Duration   | 12 months |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$1,250  
Non-member: \$1,450

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.



# RG 146 Super Reviews

Are you confident that your member facing representatives have maintained the knowledge and skills required to provide general advice in super?

ASFA's RG 146 Super Reviews can assist in determining whether representatives have a practical understanding of the difference between general and personal advice, as well as a working knowledge of relevant legislation and topical issues.

## Flexible learning formats



Flexible  
Online

### Learning outcomes

RG 146 Super Reviews are comprised of two components:

**Knowledge:** this is assessed through completion of an online multiple choice assessment. Advisers will also have access to ASFA's full RG 146 Superannuation Refresher e-learning program.

**Skills:** this is assessed through a one-on-one interview between the adviser and a qualified ASFA assessor. An interview questionnaire detailing common advice scenarios (which can be customised to specific cases if required) is provided to help advisers prepare for their interview. Each interview will last approx. 30 minutes.

### Suitable for

Front-facing staff who provide information or financial product advice directly to clients, such as:

- contact centre staff
- relationship managers, or other staff responsible for running educational seminars for super fund members
- sales and marketing team members.

|            |                   |
|------------|-------------------|
| Level      | Support           |
| CPD Points | 4.5               |
| Duration   | Approx. 4.5 hours |

## Pricing (incl. GST)\*

### Flexible Online

Member: \$595  
Non-member: \$695

### Classroom Corporate Learning

Corporate prices upon application

[Click to Enrol Now](#)

\* Please refer to ASFA's Fees and Refunds Policy and Procedure which outlines ASFA's approach to managing fees and refunds.

superannuation.asn.au

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**The Association of Superannuation Funds  
of Australia Limited (ASFA)**

Level 11, 77 Castlereagh Street  
Sydney NSW 2000

PO Box 1485, Sydney NSW 2001

T +61 2 8079 0855

E [learning@superannuation.asn.au](mailto:learning@superannuation.asn.au)

RTO Code 90755

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