

Financial Planner Courses to Get Qualified

Australian Financial Planner Courses

There are many Financial Planning Courses and Qualifications in the Financial Planning Industry. An overview of the most common Financial Planning Courses and Qualifications is below in ascending from entry level to highly specialised. All Financial Planners on Top 10 Financial Planner hold at minimum the Certified Financial Planner Designation[®] along with 5 years' experience.

Diploma of Financial Planning

The Diploma of Financial Planning is an entry level qualification for individuals starting a career in financial planning. The course structure enables you to undertake core and elective subjects that deliver technical knowledge and adviser skills leading to ASIC RG146 compliance across a range of knowledge areas.

Source: <https://www.kaplanprofessional.edu.au/courses/vocational-financial-planning-courses/diploma-of-financial-planning/>

Advanced Diploma of Financial Planning

The Advanced Diploma of Financial Planning builds upon the competencies gained in the Diploma and/or Tier 1 product training to develop the technical knowledge relevant to more complex advice scenarios. This qualification focuses on the development of the skills you need to build client centric relationships and create customer value.

Source: <https://www.kaplanprofessional.edu.au/courses/vocational-financial-planning-courses/advanced-diploma-in-financial-planning/>

Bachelor of Financial Planning

Many universities are now running financial planning courses or specialisations. Most of the Bachelor level courses are equivalent to the Advanced Diploma of Financial Planning and also meet requirements of RG146/PS146. If you intend to enrol in a University Financial Planning Course, make sure it is recognised. Most University Bachelor level Financial Planning Courses satisfy the tertiary requirements to enrol in the Certified Financial Planner[®] Program.

Certified Financial Planner[®]

CFP[®] certification is the highest level of certification that a financial planner can achieve, and it is internationally recognised. CFP professionals demonstrate their commitment to excellence in financial planning by meeting initial and ongoing competency, ethics and practice standards and agreeing to abide by the standards laid out in the FPA's Code of Professional Practice.

Globally, over 140,000 professional financial planners now hold the CFP designation. This includes the 5,500 strong community of CFP professionals in Australia who proudly fly the flag for the gold standard in financial planning.

In order to enrol in the Certified Financial Planner[®] Program all candidates must hold an approved Bachelor's Degree (i.e. Tertiary Education) on top of practical on the job experience.

Source: <https://fpa.com.au/education/cfp-certification/>

SPAA – SMSF Professionals’ Association of Australia Limited

SPAA is recognised as the peak body for professional advisors and the leading association within the SMSF industry in Australia. SPAA members deliver integrated financial services and include professionals from the following industry groups: accountants, auditors, financial planners, lawyers, risk providers, actuaries, administrators, and educators. SPAA represents professionals that provide advice in the highly complex area of self-managed superannuation funds.

SPAA’s focus is to raise the standard of advice provided by professionals within the SMSF Industry. SPAA is committed to enhancing education among SMSF professionals to assist them in their advisory capacity and to ensure that they work within the regulatory framework. SPAA’s membership and specialist accreditation makes the job of managing and advising to SMSF’s a lot simpler.

SPAA is committed to raising industry standards, promoting best practice, and looking after the needs of SMSF professionals who practice within all professional affiliations or memberships. Becoming a SMSF Specialist Advisor™ (SSA™) or SMSF Specialist Auditor™ (SSAud®) means our members are recognised as practitioners of choice by SMSF consumers.”

Source: <https://www.smsfassociation.com/about-the-smsf-association>