Master of Financial Planning
Course Code: 2793
Alignment with RG146 Requirements

The Master of Financial Planning course is accredited with the Financial Planning Association of Australia (FPA). Completion of all units satisfies the education entry pre-requisite for the CFP® Certification Program of FPA and the degree requirement for Financial Planner AFP® membership that applies from 1 July 2013.

Students receive exemption for CFP 2, 3 and 4 therefore must complete CFP 1 to be eligible to sit the CFP Certification Assessment.

The mapping below confirms the course meets the RG146 generic and specialist knowledge requirements and skills requirements, as they currently stand.

RG146 Requirements		200817 Business Communications Skills	200866 Principles of Financial Planning	200868 Investment Planning	200432 Commercial Law	200867 Superannuation	200871 Planning for Retirement	200870 Insurance & Risk Management	200869 Principles of Taxation OR 200397 Revenue Law (PG)	51168 Funds Management & Portfolio	200872 Contemporary Issues in Taxation	200959 Financial Planning Research Project	200960 Statement of Advice Research Project
RG146 Generic Knowledge Requirements	The Economic Environment		X			X	X		X	X	X		
	Operation of Financial Markets			X				X		X			
	Financial Products			X		X	X	X	X	X			
RG146 Specialist Knowledge Requirements	Financial Planning		X	X		X	X	X	X	X	X		X
	Securities		X	X	X	X	X	X	X	X	X		X
	Derivatives		X	X	X					X			
	Managed Investments		X						X	X			X
	Superannuation					X	X		X		X		X
	Insurance – general, life and broking		X				X		X		X		X
	Deposit Products and non-cash payment products			X						X			X
	Foreign Exchange									X			
	Margin Lending Facilities			X					X	X			X
	Regulated Emissions Units									X	X		
RG146 Skill Requirements	Establish relationship with client	X	X										X
	Identify client objectives, needs and financial situation	X	X										X
	Analyse client objectives, needs and financial situation		X										X
	Develop appropriate strategies and solutions		X										X
	Present appropriate strategies and solutions to the client		X										X
	Negotiate financial plan/policy/transaction	X	X										X
	Complete and maintain necessary documentation	X	X										X
	Provide ongoing service (optional at discretion of client)		X										X