Bachelor of
Applied Finance
(Financial Planning)
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This degree equips students for practice as a successful financial industry professional and will provide you with the qualification to be accredited as a financial planner.

You will learn to build relationships with clients, think problems through to provide solutions to clients’ concerns and integrate theoretical and practical knowledge to suit the requirements of this complex industry.

This program includes a professional internship which allows students to put their theory into practice. It provides you with the skills and knowledge to confidently, ethically and effectively deliver financial advice and solutions.
Financial planning professionals are trusted by consumers and businesses to provide a high standard of service and a wide range of financial advice.

As a financial professional, your clients will expect that you are appropriately qualified, ethical and have the technical and practical knowledge to confidently and effectively guide their decisions.

This degree aims to develop graduates with these attributes who will go on to become sought after professionals in their field.

As a graduate of this degree you could become a:
> financial planner
> para-planner
> investment advisor
> client relationship manager
> business investment analyst
> financial analyst
> institutional banking analyst
> superannuation specialist
> stockbroker
> business banker
> other financial services professional.

“This quality (Sydney TAFE graduates) makes them highly employable. And the team of teachers at Sydney TAFE is first rate.”

Alisdair Barr
Owner of Grad Mentor - a graduate placement program for the financial planning industry
Why study at St George College?

Sydney TAFE’s St George College is located south of the Sydney CBD in Kogarah. St George College is a large, friendly and welcoming campus which offers industry-standard facilities.

Studying at St George College, you’ll have access to facilities designed to make your learning experience stimulating, enjoyable and rewarding.

These include simulated work environments, a comprehensive library, a wide range of e-resources, seminar and group study rooms and a large cafeteria.

St George College is also a wireless learning environment.

Sydney TAFE creates success

Offered by TAFE NSW Higher Education and Sydney TAFE, this degree will give you the combination of practical and theoretical knowledge you need to develop a rewarding career.

The analysis and research methods you will learn will put you in an excellent position, and allow you to apply your skills and knowledge in a real workplace as part of your coursework.

Your learning environment

The Bachelor of Applied Finance (Financial Planning) program is characterised by its applied approach to teaching and learning. It is aligned to industry standards that shape professional conduct, ethics and standards.

Students are supported in their development by engaging in a range of reflective tasks to help evaluate their own values and practices, a process which helps students embark on a path to continuing development, which defines professional practice and conduct.

As part of the program, students will learn through lectures, tutorials, workshops, and an internship opportunity, all supported by a range of online learning materials.

A balanced teaching methodology and course structure ensures students are provided with a broad foundation aimed at developing critical thinking and synthesising concepts, delivered through a range of practical situations to create understanding of real world outcomes.

In addition, site and field visits to observe professional settings, attendance at industry professional development workshops, leader demonstrations, role plays and peer-to-peer coaching and observation will be used to further engage students.
Facilities

Your study will take place in general purpose lecture rooms and class rooms, with a wide range of additional facilities available as part of your learning environment, including:

> Wireless classrooms
> Industry standard technology
> Industry standard business tools and software packages, including XPLAN
> Simulated offices
> Higher education learning centre
> Study centre
> Conference room

Your study experience will also benefit from the extensive college facilities that include:

> Excellent library facilities
> Cafeteria
> On-site parking
> Bookshop
> and a range of student services including academic transitions skills, personal and career counselling, study support, literacy and numeracy support, multicultural services and childcare.

Professional practice and internships

Our challenge is to equip students to be successful financial services professionals, by providing them with a practical real world environment to learn in.

During Year 3, students will be required to undertake a compulsory internship. An internship offers an invaluable insight into the world of work, preparing students for their future career.

It also provides the opportunity to put the knowledge and skills gained during study, into practice.

“My study was a good foundation. I liked the interaction with other students and the fact that the teachers had experience in the field.”

Lily Wiatkowski
graduate
now working at BT
## Course structure

The Bachelor of Applied Finance (Financial Planning) meets the education requirements for the Financial Planning of Australia (FPA) Certified Financial Planner (CFP) program.

Structured to run over six semesters; full time students are required to complete four subjects per semester in the following sequence.

### Year 1

#### Semester 1
- Principles of finance and investment
- Regulation and legal principles in practice
- Academic foundations
- Foundations of accounting

#### Semester 2
- Fundamentals of personal financial planning
- Principles of economics and economic theory in practice
- Organisational behaviour
- Business statistics

### Year 2

#### Semester 1
- Marketing fundamentals
- Commercial law 1
- Insurance planning for personal risk management
- The psychology of client engagement

#### Semester 2
- Business finance
- Commercial law 2
- Income tax law
- Professional practice learning environment I (PPLE I)

### Year 3

#### Semester 1
- Professional practice learning environment II (PPLE II)
- Retirement and superannuation planning
- Investment analysis and portfolio management
- + One elective (see below)

#### Electives
- Contemporary financial planning strategies
- Financial planning practice management
- Advanced corporate finance
- Applied portfolio management
- Corporate governance
- Financial services law
- Applied income tax
- Management fundamentals

#### Semester 2
- Estate planning and business succession planning
- Financial plan construction
- + Two electives (see below)

## Eligibility and entry requirements

To apply for this course, you must have completed one of the following:
- NSW Higher School Certificate (HSC) or equivalent
- a recognised Tertiary Preparation Certificate (TPC)
- a qualification at Certificate IV level or above
- at least one year’s full-time study or equivalent in a degree course at a higher education institution.

Students whose first language is not English must also demonstrate English proficiency at a minimum IELTS level of 6.5, with a minimum level of 6 in any one band.
Your course, your campus, your services

Learner and study support
From study assistance to planning your timetable, we will work with you to ensure you get the most out of your education.

Career and personal counselling
Whether it is career guidance or help with personal matters – including health, finances and relationships – Sydney TAFE counsellors offer a free confidential service that is easy to access.

Indigenous student support
Talk with an Aboriginal Coordinator or Aboriginal Support Officers about study assistance, support with enrolment and any other issues.

Disabilities support
Students with disabilities have equal access to training. We will make sure you have the most appropriate classroom support, that modifications are made when appropriate, and we also offer a range of services such as tutorial support, sign language interpreters, note-takers and disability assistants.

Multicultural services
Multicultural Education Coordinators can help you with a range of support services, from advice and support to interpreting.

“Sydney TAFE did not provide me with the fish … they helped me and provided me with the hook to catch the fish!”
Gloria Silva
graduate
now working at Westpac
Drop in
Sydney TAFE Information Centre
827-839 George Street, Sydney, NSW
Just a short walk from Central Station
(opposite Railway Square)

Contact us
1300 360 601 (within Australia)
+61 2 9217 2900 (outside Australia)
sydney.degree@tafensw.edu.au

Visit us online
sydneytafe.edu.au/degrees