Bachelor of Applied Finance
(Financial Planning)

@ ST GEORGE CAMPUS, SYDNEY INSTITUTE

TAFE NSW
Higher Education
Sydney Institute
In 2012, Sydney Institute is offering the Bachelor of Applied Finance (Financial Planning) degree program, a higher education complement to our existing highly regarded financial planning diploma.

Building upon the success of our Diploma of Financial Planning, Sydney Institute is introducing the Bachelor of Applied Finance (Financial Planning). This career-oriented higher education program aims to respond to industry demands for dynamic professionals who are able to provide appropriate and comprehensive financial advice, whilst complying with the highest ethical standards.

The degree has been developed by academic professionals and industry experts to deliver on global best practice financial planning standards. The result is a specialist degree geared towards preparing students for the practical demands of a professional industry career.

What’s the degree about?

The Bachelor of Applied Finance (Financial Planning) is a three year professional degree that will prepare students for employment in the financial planning and financial services industries. In addition to financial planning this includes areas such as superannuation, funds management, investment banking and other related fields.

Graduates from this program will be in a strong position to build and develop relationships with clients, provide problem-solving solutions to clients, and be equipped with skills for lifelong learning.

The degree has a multidisciplinary focus and will develop practical skills as well as providing a depth of knowledge of the financial planning industry. The program covers the legal and regulatory environment, finance and investment concepts, professional communication skills, critical thinking and analysis, and reflective practice.

During the third year students are offered the opportunity to undertake an industry internship, allowing them to apply their newly-acquired knowledge and skills in a real workplace situation.

Program aims

Graduates will be in a strong position 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.

Consumers and the profession should be able to trust that their advisor has a solid educational background, sufficient technical and practical knowledge and an ethical, professional approach that promises reliable, quality advice. This degree program aims to develop graduates possessing these attributes and who will subsequently become sought-after professionals.

Since 1891, Sydney Institute has established an enviable reputation for offering unrivalled vocational education and training, to meet the skills needs of Australia’s financial industry.

Our success has been built upon providing high quality training, taught by industry professionals, and preparing graduates to excel in this fast-paced and highly competitive market.
Approach to teaching and learning

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

Students are supported in their individual development and are required to engage in reflective tasks to help evaluate their own values and practices. This process of analysis, evaluation and questioning experiences enables students to become engaged with their own learning and thus embark on a process of continuous development, which is a defining characteristic of professional practice and conduct.

A variety of teaching and learning strategies will be used to support students and to provide a platform for engagement and reflection. These strategies include lectures, tutorials, workshops and an internship opportunity, all supported by online learning materials.

The teaching methods and course structure are balanced to ensure that students are provided with a broad foundation to creatively apply methodology, think critically and synthesise concepts. This is supported by workshops to facilitate students’ understanding and enable them to apply knowledge in a variety of practical situations.

In addition, site and field visits to observe professional settings, attendance of industry professional development workshops, leader demonstrations, role plays and peer-to-peer coaching and observation will be used to further engage students in developing their own values and reflective practices.

Classrooms are equipped with wireless technology enabling students to utilise industry standard technology and business tools. This provides students with a sound basis to develop technical mastery in the development of course work and with the requisite technical proficiency when venturing into industry during their internship.

What will I become?

The Bachelor of Applied Finance (Financial Planning) will prepare graduates for a career in the financial planning and financial services sectors.

As graduates of this degree, students could be working in a variety of roles including: Financial planner, Para-planner, business investment analyst, investment adviser, client relationship manager, financial analyst or stockbroker and in the areas of client service and administration, superannuation, insurance, wealth management.
I am so glad I chose to study at Sydney Institute, it was a great environment where I met many wonderful people. The course explained the fundamentals of financial planning in an easy-to-understand way and helped me build on my communication skills. It has also benefited my transition into my current role as a Client Services Coordinator. I built fantastic relationships with both my teachers and other students who also shared my career aspirations and goals.

Mark Homsy
Financial Planning graduate and finance professional

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CRICOS COURSE CODE 00591E

Count on your future
Obtaining a Bachelor degree in financial planning will equip students with the tools needed to pursue a professional financial planning career with a range of industry roles on offer. The degree enables students to draw upon knowledge when delivering financial planning advice to clients and also when interacting with colleagues in a professional capacity.

Eligibility
Applicants are required to hold, at minimum, one of the following to be considered eligible for admission:
▲ NSW HSC (Higher School Certificate) or equivalent
▲ A recognised Tertiary Preparation Certificate (TPC)
▲ Certificate IV level or above qualification from a Registered Training Organisation
▲ At least one year full-time or equivalent in a degree course at a higher education institution

International students whose first language is not English or who have not completed their secondary education in English, or who have not completed an Australian educational qualification must demonstrate English proficiency at a minimum IELTS level of 6.5, within a minimum level of 6 in any one band.

Entry requirements
In addition to the minimum eligibility requirements, all applicants are required to:
▲ submit a 500-600 word written statement exploring a financial planning issue
▲ attend an interview which will include a short literacy and numeracy skills assessment
▲ complete a TAFE NSW Higher Education application form.

Please note: Phone interviews will be arranged for international student applications.

Attendance
Full-Time (day) three years: 16 hours per week, with an expectation that students also complete an additional 24 hours per week of independent study.

Part-Time (day) six years: 8 hours per week, with an expectation that students will also complete an additional 12 hours per week of independent study.

Course structure
Set across six semesters, the three-year Bachelor of Applied Finance (Financial Planning) is structured to encourage professional progression and development. Students will be provided with the practical and theoretical skills required for a professional career in financial planning, and have the opportunity to take part in a professional industry internship placement.
IN YEAR ONE (LEVEL 100)
Students will focus on developing core knowledge on a broad scale over a number of financial industry sectors. Principles of Finance and Investment, Regulation and Legal Principles and Organisational Behaviour are some of the subjects covered to build a solid foundation of financial planning awareness.

IN YEAR TWO (LEVEL 200)
Students will build on foundation knowledge by beginning to apply concepts and practices to sector-specific situations. Opportunities to experience relevant roles and responsibilities within the financial services environment are also available through Professional Practice Learning Environment I and the Psychology of Client Engagement.

IN YEAR THREE (LEVEL 300)
The focus for final year students is on integrating the knowledge and skills learnt in years two and three with studies in Analysing Contemporary Financial Planning Strategies and Developing Estate Planning and Business Succession Planning. At this stage students will have mastered the theoretical knowledge and practical application required to become a sound member of the financial planning profession.

Studying at Sydney Institute was the best decision I ever made.

I enjoyed the most my experience in meeting with other students in the same course, sharing ideas and working on the assessments in the groups. We learnt all different aspects in the course that were very interesting. The course has different activities in meeting clients and presenting managed fund products that have demonstrated real life practices.

My career path after completing my course is starting my business in mortgage broking which I have experience in and hopefully I can extend my business in financial planning.

Wendy Shum
Financial Planning graduate and finance professional
As a finance sector association that places a high value on training and qualification for young Australians pursuing a career in financial services, AFMA supports the TAFE Bachelor of Applied Finance (Financial Planning) degree as it will offer a new and alternative pathway for students preparing for careers in the financial services industry. The program will also assist employers by deepening the pool of individuals with the skills and knowledge required to work effectively in the industry by providing informed advice to customers and to build successful careers.

Duncan Fairweather
AFMA Executive Director

**Internship opportunities**

Our challenge is to equip students for practice as successful financial services professionals.

During year three, students will be required to undertake a compulsory internship in a professional environment. 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.

**Assessment**

An integrated and reflective approach to student assessment will be used throughout the degree to promote autonomous learning and to develop students’ understanding and critical thinking skills.

The integration of theory and practice will be encapsulated through a wide range of assessment techniques, which include: individual and team based projects supported by research, investigation of concepts, professional discourse and the development of academically sound and industry relevant papers, reports, role plays and presentations. Emphasis will be placed on student self-evaluation, critique and reflection on their own performance through the use of techniques such as self and peer assessment, problem-based learning, personal development planning and group work.

Students are expected to be able to work collaboratively and define their own goals for professional life-long practice and development, which they can use as a basis to reflect on their strengths, weaknesses and areas for development.
The learning environment created by the teachers at Sydney Institute was magnificent; they involved all students in the learning process and made the course enjoyable and interactive. Also, having exposure to industry professionals at such an early stage of my education inspired me.

I now work as a financial adviser for Commonwealth Financial Planning. Receiving face-to-face training from highly qualified teaching staff really enriched my learning experience and led to me having a greater understanding of financial planning when I eventually entered the industry myself.

Jasmin Loke
Financial Planning graduate and finance professional
Degree in Excellence

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