FNS30115 - Certificate III in Financial Services

Certificate III in Financial Services is designed to reflect the job role of entry level employees working across the entire financial services industry who perform duties relating to administrative, clerical and customer service roles in banking, credit management, insurance and retail financial services. Individuals at this level apply knowledge and skills to demonstrate autonomy and judgement and to take responsibility in known situations under general supervision.

Course Accreditation

This course is nationally recognised under the Australian Qualifications Framework (AQF).

Entry Requirements

- be 18 years or older;
- LLN - This is an on-line correspondence course so you need to have basic English reading and writing skills, or higher. As such, entry to the course requires English proficiency equivalent to Australian Year 10 level, a NRT or Trade qualification at the Certificate II level or higher, or 2 years of industry work experience. Numeracy are required to a basic level e.g. calculations with calculators.

Resources required

Computer and Internet

You will need access to a computer and the internet to complete this course.

Once enrolled, you will be emailed your login details to the learning management system. You can then access your course materials immediately.

In addition, the following software and hardware may be required depending on subjects being undertaken:

- Broadband Internet Connection
- Internet explorer version 6 or above, Mozilla Firefox, Chrome
- Microsoft Office 2007 or later
- Minimum 2GB of Ram
- CD-ROM or DVD drive
- Adobe Reader XI or equivalent
- You will also need access to a phone, printer, photocopier and scanner
- Adobe Flash Player 10 or higher
- Camera (Optional)
Specific requirements for Mac OS users:

- Mac OS X v 10.5 or higher (Mac OS X v 10.6 or higher is recommended)
- 1 gigahertz (GHz) or faster Intel processor (2GHz or faster recommended)

Specific requirements for Windows users:

- Microsoft Windows XP or higher (Windows 7 or higher is recommended)
- 1 gigahertz (GHz) or faster processor (2GHz or faster recommended)

Course Delivery

- **Online learning – Self Paced**
  Your training program is delivered via online self-paced learning. Candidates are guided through the program with the assistance of self-instructed learning materials, and online support from a Workforce Training & Development trainer/assessor.

- **RPL**
  A formal online process for recognising skills and knowledge, RPL takes into account previous studies you may have completed as well as life and work experiences. You may be granted credits or exemptions for some units in this course.

- **Face to Face (by arrangement only)**
  The training program can be delivered to groups via face to face classroom delivery. As a part of the group you will be guided through the program by a Workforce Training & Development Trainer.

Course Duration

- **Online learning – Self Paced**
  As the course is online and self-paced, completion rate is at the learner’s discretion. However, learner should aim to complete one unit per month with a total completion time limit of 13 months. An extension can be purchased should further time be required to complete the qualification at an extension fee of AU$ 150 per month or AU$ 350 for 3 months.

  Recommended hrs of study is 12 to 15 hrs per week

  Where the learner cohort consists of new entrants or inexperienced workers, they may require a longer timeframe of 23 hrs or more per week

- **RPL**
  As the RPL is online and self-paced, completion rate is at the learner’s discretion. However, learner should aim to complete within 7 months. An extension can be purchased should
further time be required to complete the qualification at an extension fee of AU$ 150 per month or AU$ 350 for 3 months.

- **Face to Face**
  As per arrangements

### Course Subjects/Units

To achieve FNS30115 Certificate III in Financial Services, **13 units** must be successfully completed: (4 of which are Core units).

<table>
<thead>
<tr>
<th>Units</th>
<th>Prerequisite Unit(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSBWOR301 - Organise personal work priorities and development</td>
<td></td>
</tr>
<tr>
<td>This unit describes the skills and knowledge required to organise own work schedules, to monitor and obtain feedback on work performance and to maintain required levels of competence.</td>
<td></td>
</tr>
<tr>
<td>FNSINC301 Work effectively in the financial services industry</td>
<td></td>
</tr>
<tr>
<td>This unit describes the performance outcomes, skills and knowledge required to correctly interpret and apply industry and organisation procedures, guidelines, policies, ethical standards and sustainability requirements to day-to-day work in the financial services industry.</td>
<td></td>
</tr>
<tr>
<td>BSBWH5201 Contribute to health and safety of self and others</td>
<td></td>
</tr>
<tr>
<td>This unit describes the skills and knowledge required to work in a manner that is healthy and safe in relation to self and others and to respond to emergency incidents. It covers following work health and safety (WHS) and emergency procedures and instructions, implementing WHS requirements and participating in WHS consultative processes.</td>
<td></td>
</tr>
<tr>
<td>BSBWOR203 Work effectively with others</td>
<td></td>
</tr>
<tr>
<td>This unit describes the skills and knowledge required to work cooperatively with others and deal effectively with issues, problems and conflict. It applies to individuals who perform a range of routine tasks using a limited range of practical skills, and a fundamental knowledge of teamwork in a defined context under direct supervision or with limited individual responsibility.</td>
<td></td>
</tr>
<tr>
<td>BSBWOR204 Use business technology</td>
<td></td>
</tr>
<tr>
<td>This unit describes the skills and knowledge required to select and use computer software and organise electronic information and data. It applies to individuals who apply a limited</td>
<td></td>
</tr>
<tr>
<td>Course Code</td>
<td>Description</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
</tr>
<tr>
<td>FNSASIC301</td>
<td>Establish client relationship and analyse needs</td>
</tr>
<tr>
<td>FNSASIC302</td>
<td>Develop, present and negotiate client solutions</td>
</tr>
<tr>
<td>BSBCUE203</td>
<td>Conduct customer engagement</td>
</tr>
<tr>
<td>BSBCUS301</td>
<td>Deliver and monitor a service to customers</td>
</tr>
<tr>
<td>FNSRTS306</td>
<td>Process customer transactions</td>
</tr>
<tr>
<td>FNSCRD301</td>
<td>Process applications for credit</td>
</tr>
<tr>
<td>FNSCUS402</td>
<td>Resolve disputes</td>
</tr>
<tr>
<td>BSBCMM301</td>
<td>Process customer complaints</td>
</tr>
</tbody>
</table>

## Course Materials

You will be provided access to learning materials including:

- Learners Guide
- Learners additional resources
- Videos
- Website Links
- Revision Quizzes
- Assessments
- Additional assessment resources
Payment Options

**PAY UPFRONT:** You have the option to pay course fees upfront utilising either credit card payment or through PayPal.

**PAYMENT PLAN:** Alternatively, you have the option of entering into a payment plan based on monthly or per unit payment

Course Fee

Online learning self-paced – AU$ 2300
RPL – AU$ 900

Refund Policy

- Students who notify to cancel their enrolment within 5 days of commencement of course/unit and the resources are not downloaded from our Learning Management System can get a full refund however an administration enrolment fee of $250 will be retained.

- Students who notify to cancel their enrolment after 5 days of commencement of course/unit and prior to 1 month will receive a refund of 75% of course fees excluding the enrolment fee of AU$250.

- Students who cancel their enrolment after 1-month of the commencement of training program has commenced will not be entitled to a refund of fees of any fees paid in advance.

The amount retained by Workforce Training & Development is required to cover the costs of staff and resources which will have already been committed based on the student’s initial intention to undertake the training.

Assessment

To successfully complete the course, you will be required to complete a range of assessment activities to test

a) General
b) Specific and
c) Performance based knowledge

Assessment may take the form of written, oral questioning, case studies, workplace observations, or third party reports.

Assessment is used to provide candidates with feedback on their progress and to measure their skills and knowledge against the training qualification requirements and those of the industry.
Training outcome

Candidates successfully completing the course will receive a Certificate III in Financial Services. Candidates who partially complete the course will receive a Statement of Attainment for the units of competency that they have successfully completed.

Potential career opportunities

- Customer Service Officers
- Lending Officers & Brokers
- Tellers and Cashiers
- Call Centre Contact Officers
- Administration Clerks
- Finance Officers

Please visit our website for more details & to refer to policies and procedures

http://www.workforceonline.edu.au/