

National Certificate in Financial Services (Level 4) (50 credits)

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| Compulsory | <p align="center">PRINCIPLES OF PROFESSIONAL PRACTICE Unit Standards: 1277 and 24755</p> <p>Provides learners with the skills to communicate effectively and apply the principles of professional practice in a financial organisation.</p> | <u>Credits</u> 8 |
| | <p align="center">GENERIC KNOWLEDGE Unit Standard: 24757</p> <p>Provides learners with generic knowledge of the products and services used in financial services organisations.</p> | 5 |
| | <p align="center">CONSULTATIVE SELLING SKILLS Unit Standards: 24758, 24763, 24767, 24768, 24769, 24762, and 24766</p> <p>Provides learners with essential prospecting, client relationship and sales skills in a financial services context.</p> | 25 |

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| <p>EFFECTIVE FINANCIAL SOLUTIONS – Electives</p> <p>Provides learners with skills and knowledge relevant to specific roles in a financial services organisation or context.</p> |
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| Electives <i>A minimum of one elective option to be selected</i> | <p align="center">INVESTMENTS Unit Standards: 24759, 24765 and 24773 <i>Covering:</i> Managed Funds and KiwiSaver</p> | <u>Credits</u> 13 |
| | <p align="center">MORTGAGE BROKING Unit Standards: 24759, 24765 and 24772 + Mortgage Broking specific unit standard currently undergoing registration with NZQA</p> | 13 |
| | <p align="center">INSURANCE Unit Standards: 24759, 24765 and 24773 <i>Covering:</i> Life, Health and Fire and General Insurance</p> | 13 |
| | <p align="center">FINANCIAL LITERACY Unit Standards: 24759, 24765 and 24774 <i>Covering:</i> Cash and Debt Management</p> | 12 |
| | <p align="center">PARAPLANNING Unit Standards: 24772, 24773 and 24775</p> | 13 |

Adviserlink is accredited and approved by NZQA to deliver this National Qualification under the Education Act 1989.