

National Certificate in Financial Services (Level 4)

The National Qualification offered by Adviserlink is delivered in four modules:

Delivery Module 1: Principles of Professional Practice

Objective To provide the learner with the skills to communicate effectively and apply the principles of professional practice in a financial organisation.

Delivery Module 2: Generic Knowledge

Objective To provide the learner with the foundation knowledge of the industry and products and services used in a financial services organisation,

Delivery Module 3: Consultative Selling Skills

Objective To provide the learner with the essential prospecting, client relationship and sales skills in a financial services organisation.

Delivery Module 4: Effective Financial Solutions

Objective To provide the learner with specific knowledge as it relates to chosen areas and roles utilised in a financial services organisation.

A minimum of one elective strand to be selected:

- Strand 1 Insurance
- Strand 2 Investments
- Strand 3 Mortgage Broking
- Strand 4 Financial Literacy
- Strand 5 Paraplanning

Learners can complete the qualification through one of two channels:

1. Full Programme – this will require completion of all four modules via a self directed education process, which incorporates paper-based and online activities and assessment, and workplace observation over a 12 month period.
2. RPL (Recognition of Prior Learning) Assessment – learners will be evaluated for eligibility to complete the qualification via the RPL assessment process, which will require ‘evidence’ that all competencies can be consistently demonstrated to the required level. This option would be suitable for more experienced candidates that may have already completed similar training and/or already have on-the-job experience.

2009 Special Pilot Offer!!

Full National Certificate in Financial Services (Level 4) Qualification

Via Distance Education Programme \$1180

Via RPL Assessment Process \$255

Workshop options on application

Adviserlink Contact Details:

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For information on course updates please contact us, or refer to our website www.adviserlink.co.nz