



RTO Number 91485

INSTITUTE OF STRATEGIC MANAGEMENT



FNS40815

CERTIFICATE IV IN FINANCE & MORTGAGE BROKING

TRAINEESHIP

FNS40815 CERTIFICATE IV IN FINANCE AND MORTGAGE BROKING



OVERVIEW

The Certificate IV in Finance and Mortgage Broking is ideally suited for people seeking to work as finance/mortgage brokers as well as those who provide lending information to your organisation's customers.

PROGRAM SCHEDULE

This traineeship qualification is delivered online with supporting coaching sessions.

Key points:

- Enrol now, start now
- 5 modules across 40 weeks
- 2 x 2 hr session per modules = 20 hours
- 10 coaching sessions @ half hour = 5 hrs (by appointment)
- 5 special guest speaker sessions = 5 hours
- Trainer and administration support included
- Access your e-learning portal anywhere, anytime



COURSE REQUIREMENTS

To achieve FNS40815 Certificate IV in Finance and Mortgage Broking, the participant will need to complete 12 units of competency.



Core Units

FNSINC401 – Apply principles of professional practice to work in the financial services industry

FNSFMK505 – Comply with financial services legislation

BSBITU306 – Design and produce business documents

FNSFMB401 – Prepare and present loan application on behalf of finance or mortgage broking client

FNSFMB402 – Provide finance and/or mortgage broking services

FNSFMB403 – Present broking options to client

FNSINC402 – Develop and maintain in-depth knowledge of products and services used by an organisation or sector

FNSCRD301 – Process applications for credit

Elective Units

FNSFMB501 – Settle application and loan arrangements in the finance/mortgage broking industry

BSBCUS301 – Deliver and monitor a service to customers

FNSCUS501 – Develop and nurture relationships with clients, other professionals and third party referrers

BSBWOR501 – Manage personal work priorities and professional development

FNSSAM403 – Prospect for new clients



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TIMETABLE

Modules	Week	Session	Topics
Module 1	1	Webinar	The make up of the financial services industry
	2	Individual Coaching	The responsibilities of a Broker
	3		The importance of a sustainable business
	4		the role of the MFAA, FBAA and their requirements
	5	Webinar	
	6		
	7	Individual Coaching	
	8	Guest speaker	
Module 2	9		Key compliance issues
	10	Webinar	National Credit Code and it's relationship to the broker's role
	11		The principles of responsible lending
	12		Privacy Law and the consequences of breaches of privacy
	13	Individual Coaching	Fraud areas that affect broking
	14		Case studies
	15		
	16	Guest speaker	
Module 3	17		Loan categories
	18	Webinar	Features and benefits of a range of loan types
	19		Loan product options for a range of clients
	20		Case studies
	21	Individual Coaching	
	22		
	23		
	24	Guest speaker	
Module 4	25		The home loan process
	26	Webinar	The 5C's of Lending
	27		Lending institutions and applications
	28	Guest speaker	Calculating key lending ratios
	29	Webinar	Design and produce professional business documents
	30	Individual Coaching	
	31	Webinar	
	32	Individual Coaching	
Module 5	33		Communication skills required as a broker
	34	Webinar	The sales process
	35	Individual Coaching	Completing a Needs Analysis
	36	Guest speaker	The importance of maintaining contact post settlement
	37	Webinar	
	38	Individual Coaching	
	39	Webinar	
	40	Role Play	



COURSE FEE

- Traineeship: \$2,400.00

