Join one of Australia’s premier business schools, recognised nationally and internationally for its quality education, career outcomes and research. The UniSA Business School is the only business school in South Australia, and one of only nine in Australia, accredited by EQUIS – the EFMD Quality Improvement System.

Prepare for a global career in financial planning and learn from thought leaders as they share their insights and expertise for best practice in the contemporary world.
The University of South Australia is one of the first institutions nation-wide to offer financial planning programs and courses approved by the Financial Adviser Standards and Ethics Authority (FASEA).

The financial services profession has recently introduced new education standards, making it more important than ever for existing and aspiring financial advisers to hold a recognised qualification.

If you’re currently working in financial planning, you’ll need to complete a FASEA-approved program by 2026 to continue practising. If you’re seeking a career change, you’ll now need to study a FASEA-approved program to enter the profession.

Our new financial planning programs are designed to meet industry education requirements and cater to all levels of experience, with the flexibility to study full-time, part-time, at UniSA’s City West campus in the heart of Adelaide’s West End, 100% online, or in mixed mode.

Undertaking your program in mixed mode offers you the flexibility to blend on-campus and online learning so you have the option to alternate how you study. You may also be able to study some courses in intensive mode.

"Having a FASEA-approved qualification is now imperative to a successful career as a financial adviser. The new FASEA requirements will effectively reshape Australia’s network of financial advisers. Financial planners who are able to adapt to change, continually learn new things, possess good communication skills, and demonstrate flexibility and resilience will be the most successful in their career."

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**How do I become a licensed financial adviser?**

**Are you an existing adviser?**

**ARE YOU AN EXISTING ADVISER?**

**DO YOU HAVE A PREVIOUS QUALIFICATION?**

**DO YOU HAVE A PREVIOUS DEGREE QUALIFICATION?**

**NO**

**YES**

**With a minimum of 5 years’ industry experience in a related financial services role:**

- Graduate Certificate in Financial Planning (as a direct entry pathway into the Master’s)

**With no industry experience:**

- Bachelor of Business (Financial Planning)

**With a relevant degree:**

- Graduate Diploma in Financial Planning

**With a non-relevant degree:**

- Master of Finance (Financial Planning)

*Credit is available for prior learning and FASEA-approved professional designations.*

**With an approved degree or relevant degree:**

- Bridging course/s* or Graduate Certificate in Financial Planning

**Non-relevant degree:**

- Graduate Diploma in Financial Planning*

*The number of bridging courses required is dependent on prior learning and FASEA-approved professional designations. There is also an option to transition into the Graduate Certificate in Financial Planning and graduate with a degree.*

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**Definitions**

- **Existing adviser:** Any person who was ‘current’ on the ASIC’s Financial Advisers Register, or who provided personal advice in a foreign country to retail clients in relation to relevant financial products at any time between 1 January 2016 and 1 January 2019 (and was not prohibited from providing advice on 1 January 2019).

- **New entrant:** Any person who does not meet the above definition of an existing adviser.

- **Relevant degree:** An AQF 7, 8 or 9 qualification that contains at least 8 courses in one or more of the designated fields of study (and in any combination) — financial planning, accounting, taxation law, finance law, finance, business law, investments, estate law, banking, and economics.

- **Non-relevant degree:** An AQF 7, 8 or 9 qualification in any field of study different to the areas listed under Relevant degree.

- **Approved degree:** A degree that is listed in the Corporations (Relevant Providers Degrees, Qualifications and Courses Standards) Determination 2018 — a FASEA-approved AQF 7, 8 (Graduate Diploma) or 9 qualification.
A GROWING INDUSTRY

The financial services sector plays a critical role in the nation’s economy, and the financial wellbeing of all Australians.

Between now and 2023, the ABS projects the number of professional finance roles in Australia will increase*, and with more than 193,400 financial planning businesses in operation, your opportunities for career progression are strong.

With a qualification from UniSA, you’ll meet FASEA’s education requirements to practise as a financial adviser across a diverse range of roles in areas including financial planning, investment, insurance, superannuation, estate planning and more.

STUDY OPTIONS

BRIDGING COURSES

If you are an existing financial adviser and have previously studied an approved or relevant degree, you may only need to complete a selection of remaining courses to meet FASEA education requirements.

From 2020, we’ll be offering three FASEA-approved bridging courses you can study as standalone courses based on your prior learning and FASEA-approved professional designations. Depending on your individual circumstances, you may need to undertake one, or all, of these courses.

Each course is equivalent to one 4.5 unit postgraduate course.

Bridging courses offered include:

- Ethics and Professionalism
- Financial Advice Regulatory and Legal Obligations
- Behavioural Finance: Client and Consumer Behaviour

You can also choose to undertake these courses as part of our Graduate Certificate in Financial Planning and graduate with a degree in six months full-time study (or part-time equivalent). FASEA will formally recognise courses completed through this program.

Bridging courses can be studied on campus, 100% online, in mixed mode or as intensives, providing you with the flexibility to choose the best learning option for you.

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*Australian Bureau of Statistics, Catalogue 8165.0 – Counts of Australian businesses, including entries and exits, June 2012 to June 2016, Table 1–20 (includes the insurance industry).
**If you are seeking to enter the financial services sector and have no prior qualification or industry experience, we also offer a Bachelor of Business (Financial Planning) which can be studied on campus, 100% online or in mixed mode in 3 years full-time (or part-time equivalent).**

**If you are an existing financial adviser with an approved or relevant degree, you can choose to complete your FASEA-approved bridging courses as part of our Graduate Certificate in Financial Planning.**
We work closely with industry to develop our course content, and regularly consult with FASEA to ensure your qualifications meet the most up-to-date education requirements.

Many of our teachers are experts in financial planning, either in practice themselves, or as researchers recognised as performing world-class in Finance*, so you will be supported and guided by a team of experienced professionals right from day one.

Throughout your studies, you’ll also gain contemporary career planning strategies and techniques to boost your employability and achieve your career goals. You’ll have opportunities to network and connect with professional bodies such as the Financial Planners Association (FPA) and Association of Financial Advisers (AFA), as well as other financial planning professionals.

Depending on your program, you may have the option to learn on campus, 100% online, in mixed mode or as intensive study, providing you with all the flexibility you need to balance your career and lifestyle.

If you choose to study all, or part, of your degree on campus, you will learn face-to-face in modern, purpose-built facilities at UniSA’s City West campus. You’ll have access to dedicated support services and next-generation learning spaces such as our state-of-the-art Iress Trading Room, which features a market data feed and the latest industry-standard technology.

You can also join our Executive Partners Program, which is designed to provide you with invaluable mentorship, industry insights and expert advice from a senior business leader, as well as View From The Top – an exclusive networking and seminar series that connects you with inspiring thought leaders.

Our 100% online, career-focused degrees give you full control and ultimate flexibility over your study. Access online student support seven days a week, plan your study to fit around your life, view learning resources 24/7, and log in to the interactive online environment anywhere, any time and on any device. Designed for people who lead busy lives, you’ll be able to engage with learning activities when it’s convenient for you – even if that means studying in your lunch break. UniSA Online degrees open up a world of exciting opportunities to advance your career or reinvent yourself in the workplace.

*2018 Excellence in Research for Australia (ERA).

**Clients express satisfaction in knowing that they are dealing with someone who has passed the academic requirements to hold the industry’s highest qualifications and be at the forefront of technical knowledge and skills. In an ever-changing environment, continual learning represents commitment to being the best I can be for myself, my business and my clients.**

**MARK BASTIAANS / PRINCIPAL FINANCIAL ADVISER, ADVICE SA & UNISA FINANCIAL PLANNING LECTURER**

**CONTACT US**

To learn more and apply, visit unisa.edu.au/financial-planning

To make an enquiry, contact us on (08) 8302 2376 or visit unisa.edu.au/enquire

<table>
<thead>
<tr>
<th>COURSE</th>
<th>Bridging courses</th>
<th>Graduate Certificate in Financial Planning</th>
<th>Graduate Diploma in Financial Planning</th>
<th>Master of Finance (Financial Planning)</th>
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<tbody>
<tr>
<td>Ethics and Professionalism</td>
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<td>Financial Advice Regulatory and Legal Obligations</td>
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<td>Risk Management and Insurance C</td>
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<td>Statistics for Data Science</td>
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</tbody>
</table>

I = individual course ✓ = compulsory core course E = elective option * = content covered in other courses

ENRICHING THE WAY YOU LEARN

EXAMINATION SUPPORT

As part of your studies, you’ll have the opportunity to access exam preparation resources or workshops so you feel confident and prepared for your university and FASEA exams. We’ll provide you with useful strategies, tips and support – all the information you need to succeed.
Acknowledgement of Country

UniSA respects the Kaurna, Boandik and Barngarla peoples’ spiritual relationship with their country. We also acknowledge the diversity of Aboriginal peoples, past and present.

Find out more about the University’s commitment to reconciliation at unisa.edu.au/RAP

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