MONARCH
INSTITUTE

Tax (Financial) Adviser Course

- Get the skills that employers really want.
- Unrivalled support. Delivered with care.
- Absolute flexibility. Your way, your terms.

Education for the real world

RTO Code - 22530

Nationally Recognised Training

Pathways to practice

The Tax Financial Adviser course is made up of units that fall under the Australian Qualifications Framework. This means you may be able to use your course results to help you gain entry to a higher education course. Once you've completed this short course, you can also go on to study a Diploma of Financial Planning or an Advanced Diploma of Financial Planning. These diploma-level courses may allow you to give more holistic advice to your clients*.

The units you undertake in this course will help prepare you for the tasks and assessments you'll do as part of the Diploma or Advanced Diploma. Learning about tax law and commercial law will also give you a fresh perspective on the real-world practice topics you study next.

*Depending on when you complete your Diploma and begin practicing. Contact us for more information on how we can help you meet your education requirements as a financial adviser, now and into the future.

What does the course cover?

In total, you'll study two nationally accredited units packed with practical and technical topics. These are:

Apply taxation requirements when providing Tax (Financial) Advice services (MTLTFA) (FNSTPB506)

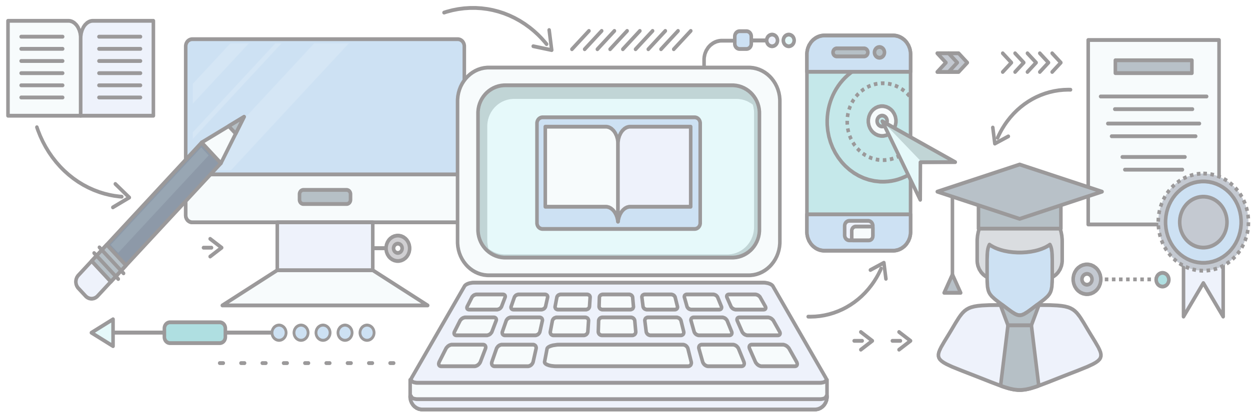
- Tax treatments for individuals
- Concepts of income (assessable and exempt), deductions, tax offsets, tax losses
- Tax treatment for entities such as trusts, partnerships, companies, superannuation funds
- Capital gains tax
- Fringe benefits tax
- Goods and services tax
- International taxation

Apply legal principles in commercial law when providing Tax (Financial) Advice services (MCLTFA) (FNSTPB507)

- Framework of the Australian legal system
- Introductory contract law
- Contract formation, validity and performance
- Fundamental legal concepts of business organisational structures
- Aspects of the law of torts, particularly negligence and negligent misstatement
- Key provisions of the Competition and Consumer Act, esp. misleading and deceptive conduct
- Negligence and risk
- Business structures
- The company as a legal entiy
- Directors' duties
- Trusts and associations

TPB approved course

This course meets the Tax Practitioners Board (TPB) education requirements for becoming a registered tax (financial) adviser. The law states you must be registered if you're providing tax-related financial advice. This applies whether you provide a full advice service, or whether you concentrate on tax advice. You can read more about the education requirements on the TPB website; it's the most up-to-date source of information.



What is the course structure?

This course is delivered completely online. This means you'll access your learning and assessment resources using an online portal. You can access this anywhere and anytime. You'll also have access to a student Facebook group for further discussions.

What is the course duration?

Students are expected to complete the course within six months. Some may get it done quicker, depending on their learning background and work experience.

Having trouble wrapping your head around a concept or assessment piece? You can reach out to your trainer for support at any time during these six months.

What are the entry requirements?

There are no formal entry requirements. Just bring your drive, motivation and passion for the industry. That said, if this is your first time studying at this level, we'll need to check your levels of English and maths before you enrol. People with disabilities are encouraged and supported to apply.

What about the assessments?

The experts who design and deliver our courses have developed an assessment framework that's uniquely designed to help you gain a deep understanding of the material. Assessment formats include:

- Case studies
- Multiple-choice questions
- Short-answer questions
- Workplace scenarios
- Projects

Course costs

Monarch's courses are competively priced.

Check our website for the most up-to-date prices at **www.monarch.edu.au/courses** or call us on **1300 738 955.**

Why choose Monarch Institute?

You need a different learning experience. We're ready to deliver.

Expertise

- ✓ Courses developed with leading academics and industry associations
- ✓ Delivered by brilliant trainers who work with corporate leaders
- ✓ Learn from professionals using real world case studies

Flexibility

- ✓ Fit study around work, family, life.
- ✓ Start immediately, or down the track
- ✓ Flexible payment options

Support

- ✓ Dedicated team of trainers and support staff on hand to guide you
- ✓ Up to date, easy to understand course materials
- ✓ Assessment turnaround in 5-7 business days with comprehensive trainer feedback

Enrol today

Commence your Tax (Financial) Adviser Course with Monarch Institute today to take the next step forward in your career.

To discuss the course that's right for you call
1300 738 955

To find out more information email
info@monarch.edu.au

To enrol, visit our website
www.monarch.edu.au