



## APPROVED BRIDGING COURSES AND RTOs

For entry into the CFP® Certification Program

An approved Bridging Course can be added to a degree (other than an FPA approved degree).

### **Degree plus university-level bridging program**

The pre-admission process is a way of establishing what gaps you may have. You can select a university-level bridging course to add to another degree to satisfy the approved degree requirement. This may be a single subject or a group of subjects or a qualification. Bridging subjects at Bachelor or Postgraduate level are in the Approved Bridging Subject list.

### **Degree plus TAFE-level bridging program**

The combination of a degree with an Advanced Diploma of Financial Planning is a pathway to become a CFP practitioner. When selecting a course, check that ASIC requirements and Tax Practitioner Board requirements are satisfied.

### **ASIC Competencies:**

You must satisfy ASIC's RG146 requirements for at least: financial planning, superannuation, life insurance and managed investments. This includes generic knowledge and skills.

If you are studying diploma/advanced diploma, you must have the following on your Statement(s) of Attainment or Transcript of Competencies:

- FNSASICX503\* - Provide advice in Life Insurance
- FNSASICT503\* - Provide advice in Managed Investments
- FNSASICU503\* - Provide advice in Superannuation
- FNSASICZ503\* - Provide advice in Financial Planning

We would also recommend: FNSASICR503\* - Provide advice in Margin Lending and FNSASICW503\* - Provide advice in Securities.

It is important to check that your RTO offers at least these competencies. They are not compulsory to achieve a diploma, but are necessary to be a financial planner.

### **Tax Practitioners Board Requirements**

The Tax Practitioners Board has released its requirements for a course in "taxation law" and a course in "commercial law". These are not prerequisites to Certification, but will assist in your career. The competencies are:

- FNSTPB507 Apply legal principles in commercial law when providing tax (financial) advice services.
- FNSTPB506 Apply taxation requirements when providing tax (financial) advice services.

The competencies to meet the TPB requirements are not normally offered within either the Diploma or Advanced Diploma and are extensions.



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### OPTION 1 Non-Finance Degree with Advanced Diploma of Financial Planning or equivalent

Code	Qualification	Status
FNS60415	Advanced Diploma of Financial Planning	Current
FNS60410	Advanced Diploma of Financial Planning	Superseded
FNB60404	Advanced Diploma of Financial Services (Financial Planning)	Superseded
FNS60402	Advanced Diploma of Financial Services (Financial Planning)	Superseded
N/A	FPA Diploma of Financial Planning (DFP 1-8)	Superseded

### OPTION 2 Finance Related Degree with a Diploma of Financial Planning or equivalent

Code	Qualification	Status
FNS50615	Diploma of Financial Planning	Current
FNS50611	Diploma of Financial Planning	Superseded
FNS50610	Diploma of Financial Planning	Superseded
FNS50804	Diploma of Financial Services (Financial Planning)	Superseded
FNB50802	Diploma of Financial Services (Financial Planning)	Superseded
N/A	FPA Foundation Diploma (DFP 1-4)	Superseded

## Registered Training Organisations (RTOs)

The FPA does not evaluate Registered Training Organisations or their courses.

This list was extracted from [www.training.gov.au](http://www.training.gov.au) and shows all RTOs approved by AQSA to offer the qualifications as at 22 May 2017: Diploma of Financial Planning FNS50615 or Advanced Diploma of Financial Planning FNS60415. Other RTOs are approved to offer ASIC competencies. NB Some universities also offer these qualifications.

RTO	Website	Phone	DFP	ADFP
AAMC Training Group Pty Ltd	<a href="http://www.aamctraining.edu.au">www.aamctraining.edu.au</a>	08 9344 4088	✓	✓
Academy of Global Business Training	N/A	1300 132 628	✓	✗
Association of Superannuation Funds of Australia Limited	<a href="http://www.superannuation.asn.au">www.superannuation.asn.au</a>	02 9264 9300	✓	✗
Australian College of Professionals Pty Ltd	<a href="http://www.acop.edu.au">www.acop.edu.au</a>	1300 884 810	✓	✗
CPA Australia	<a href="http://www.cpaaustralia.com.au">www.cpaaustralia.com.au</a>	1300 737 373	✓	✗
Deakin University (DeakinCo)	<a href="http://www.deakinco.com">www.deakinco.com</a>	03 9918 9000	✓	✗
Holmesglen Institute	<a href="http://www.holmesglen.edu.au">www.holmesglen.edu.au</a>	1300 639 888	✓	✗
Integrity Education Group Pty Ltd	<a href="http://www.integrity.edu.au">www.integrity.edu.au</a>	1300 400 346	✓	✓
International Institute of Technology Pty Ltd	<a href="http://www.iit.edu.au">www.iit.edu.au</a>	1300 883 346	✓	✓
Investment Banking Institute Pty Ltd	<a href="http://www.ibi.edu.au">www.ibi.edu.au</a>	0417 106 625	✓	✓
Kaplan Professional, Kaplan Education Pty Ltd	<a href="http://www.kaplanprofessional.edu.au">www.kaplanprofessional.edu.au</a>	1300 662 203	✓	✓
Monarch Institute Pty Ltd	<a href="http://www.monarch.edu.au">www.monarch.edu.au</a>	1300 738 955	✓	✓
Pass Global Pty Ltd (Australian Learning Training and Education Centre)	<a href="http://www.altec.vic.edu.au">www.altec.vic.edu.au</a>	03 9529 1783	✓	✗
Pinnacle Financial Services Academy Pty Ltd	<a href="http://www.pinnacle.edu.au">www.pinnacle.edu.au</a>	1300 782 822	✓	✓
Quantum Financial Services Australia Pty Ltd (Quantum Financial Training)	<a href="http://www.quantumfinancial.com.au">www.quantumfinancial.com.au</a>	02 8084 0453	✓	✓
RG146 Training Australia Pty Ltd (Mentor Education (A&NZ))	<a href="http://www.mentor.edu.au">www.mentor.edu.au</a>	1300 306 146	✓	✓
Royal Melbourne Institute of Technology (RMIT University)	<a href="http://www.rmit.edu.au">www.rmit.edu.au</a>	03 9925 2000	✓	✗



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TAFE NSW - Northern Sydney Institute	<a href="http://www.tafestudy.info">www.tafestudy.info</a>	131 674	✓	✓
TAFE NSW - Sydney Institute	<a href="http://www.sit.nsw.edu.au">www.sit.nsw.edu.au</a>	1300 360 601	✓	✗
TAFE SA, TAFE South Australia (Adelaide North Institute, Regency International Centre)	<a href="http://www.tafesa.edu.au">www.tafesa.edu.au</a>	1800 882 661	✓	✗
Technical and Further Education Commission (TAFE NSW)	<a href="http://www.tafensw.edu.au">www.tafensw.edu.au</a>	131 601	✓	✓
The Malka Group Pty Ltd (TMG Training and Consulting)	<a href="http://www.tmg.edu.au">www.tmg.edu.au</a>	03 9896 3350	✓	✗
Traineeship Management Australia Pty Ltd	<a href="http://www.tmaus.net.au">www.tmaus.net.au</a>	03 94193466	✓	✗