



FNS30110 CERTIFICATE III IN FINANCIAL SERVICES

This qualification is designed to reflect the job role of entry level employees working across the entire financial services industry performing roles such as:

- Responding to customer enquiries
- Maintaining financial records
- Sales and service
- Clerical duties
- Receptionist
- Applying fundamental skills in banking, credit management, insurance and retail financial services

ENTRY REQUIREMENTS

There are no pre-requisites for entry into this qualification.

EMPLOYMENT OPPORTUNITIES

Individuals with this qualification are able to perform roles, such as:

- Collecting and collating data and presenting the information in a report form
- Using electronic communication such as internet and specialist software to produce correspondence and reports
- Trouble shoot and resolve problems, validate information and contribute to planning processes.

OCCUPATIONAL NAMES

Job roles and titles vary across different industry sectors. Possible job titles relevant to this qualification include:

- Personal assistant to Chief Financial Officer
- Administration Assistant
- Payroll Clerk

CAREER PATHWAY

Depending on the sector entered specialist FNS10 Financial Services Training Package qualifications at Certificate III and IV would support career progression.

SKILLS RECOGNITION

If you already have some training, work or life experience in management, team leader role or coordinator, you may be eligible to have your existing skills and knowledge recognised and apply for advanced standing for one or more units. Processes for recognition include:

- Credit transfer
- Mutual recognition
- Recognition by assessment



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COURSE OUTCOMES

Gain the skills required to:

Conduct research to collect and analyse information and present it in report form

Investigate and negotiate to resolve disputes

Use specialist language in written and oral communication and write in a range of styles to suit different audiences

Receive feedback on performance

Refer matters to nominated person as required

Work as a member of a team and apply knowledge of one's own role to achieve team goals

Collect, compare and contrast data in order to create reports

Contribute to the design and preparation of reports to effectively present workplace information

Plan work considering resources, time and other constraints

Process routine documents and maintain files, manage information and schedule and coordinate competing tasks

Acquire and apply knowledge of service and organisational policies and procedures

Use electronic communication devices and processes such as internet, software packages and email to produce written correspondence and reports

Use online help and manuals to solve basic technology problems

Use a range of techniques and sales skills to elicit feedback from customers

Liaise with internal and external personnel with an ability to 'read' verbal and non-verbal body language

Identify cross-selling opportunities

Contribute to solutions to workplace challenges

Operate with industry and organisational codes of practice, legislation and regulations

Use problem solving tools and techniques to balance and reconcile amounts

Contribute to the planning process by researching and validating information relating to estates

Manage own time and priorities and deal with contingencies

Take responsibility as required by work role and ensure all organisational policies and procedures are followed

Use technology to assist the management of information and to assist the planning of process

Have the ability to question, clarify and evaluate information as well as seek advice on technical issues



Course Structure

To complete this qualification, the student is required to complete 13 Units. This comprises of 4 core units and 9 elective units from the list below.

Elective units must be relevant to work outcome, local industry requirements and the qualification level.



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Core Units

BSBOHS303B	Contribute to OHS hazard identification and risk assessment
BSBWOR203A	Work effectively with others
BSBWOR204A	Use business technology
FNSINC301A	Work effectively in the financial services industry

Elective Units

BSBCCO201A	Action customer contact
BSBCCO304B	Provide sales solutions to customers
BSBITU304A	Produce spreadsheets
BSBRKG303B	Retrieve information from records
BSBRKG304B	Maintain business records
FNSACC303A	Perform financial calculations
FNSASIC301C	Establish client relationships and analyse needs*
FNSASIC302C	Develop, present and negotiate client solutions*
PSPGOV414A	Provide workplace mentoring
FNSRTS301A	Provide customer service in a retail agency
FNSRTS303A	Balance retail transactions
FNSRTS305A	Process customer accounts
FNSRTS306A	Process customer transactions

*refer to units required for Tier 2 ASIC accreditation and external recognition in line with financial service reform (FSR) compliance.

Learning Outcomes:

Core Units:

BSBOHS303B Contribute to OHS Hazard identification and risk assessment

1. Contribute to workplace hazard identification
2. Gather information about workplace hazards
3. Contribute to OHS risk assessment

BSBWOR203A Work effectively with others

1. Develop effective workplace relationships
2. Contribute to workgroup activities
3. Deal effectively with issues, problems and conflict

BSBWOR204A Use business technology

1. Select and use technology
2. Process and organise data
3. Maintain technology

FNSINC301A Work effectively in the financial services industry

1. Work within financial services industry guidelines, procedures and legislation
2. Communicate in the workplace
3. Work safely
4. Use workplace technology
5. Work in a team environment
6. Develop effective work habits



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Elective Units:

BSBCCO201A Action customer contact

1. Prepare for customer contact
2. Provide responsive and quality service in response to customer queries
3. Arrange provision of a product or service
4. Manage customer contact

BSBCCO304B Provide sales solutions to customers

1. Identify customer needs
2. Close sales
3. Input sales records
4. Provide sales support where required

BSBITU304A Produce spreadsheets

1. Select and prepare resources
2. Plan spreadsheet design
3. Create spreadsheet
4. Produce simple charts
5. Finalise spreadsheets

BSBRKG303B Retrieve information from records

1. Locate/retrieve records required
2. Ensure security of records
3. Provide required information from records

BSBRKG304B Maintain business records

1. Collate business records
2. Update business or records system
3. Prepare reports from the business or records system

FNSACC303A Perform financial calculations

1. Obtain data and resources for financial calculations
2. Select appropriate methods and carry out financial calculations
3. Check calculations and records outcomes

FNSASIC301C Establish client relationship and analyse needs

1. Establish relationship with client
2. Identify client objectives, needs and financial situation
3. Analyse client's objective, needs, financial situation and risk profile



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FNSASIC302C Develop, present and negotiate client solutions

1. Develop appropriate strategies and solutions
2. Present appropriate strategies and solutions to client
3. Negotiate financial plan, policy or transaction with client
4. Coordinate implementation of agreed plan, policy or transaction
5. Complete and maintain necessary documentation
6. Provide ongoing service where requested by client

PSPGOV414A Provide workplace mentoring

1. Establish the need for mentoring
2. Develop a mentoring plan/framework
3. Facilitate mentoring relationship
4. Monitor mentoring relationship
5. Evaluate effectiveness of mentoring

FNSRTS301A Provide customer service in a retail agency

1. Represent the financial services institution
2. Identify the customer financial service needs
3. Process customer transactions

FNSRTS303A Balance retail transactions

1. Maintain terminal balances
2. Remove receipts from terminal
3. Reconcile receipts

FNSRTS305A Process customer accounts

1. Identify customer account needs
2. Open customer account
3. Transfer or close customer account
4. Administer the process

FNSRTS306A Process customer transactions

1. Provide customer service
2. Process basic financial transactions
3. Administer the transaction process



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