

AIST

2013 Course Guide

Built by the industry, for the industry

The AIST Education team are committed to your learning success and our consultants are highly qualified and knowledgeable workplace training and assessment professionals.

Meet our team



Meegan George

Executive Manager, Education

Meegan has over 18 years' experience in the finance industry, including her current role of Executive Manager, Education for the Australian Institute of Superannuation Trustees (AIST). Previous roles include FINSIA where she worked with key FINSIA and industry stakeholders to develop the Financial Services Professional (FSP) Credential in Private and Business Banking. Prior to that Meegan worked with other financial institutions such as RGA International, AMP and JP Morgan to develop domestic and international educational frameworks and pathways focused on enhancing specialist and practitioner skills and capabilities in areas such as Insurance, Financial Planning and Global Custody.

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Nick Duffy

Professional Development Manager

Nick is a qualified workplace trainer and assessor who has been involved in training since 2000, having worked in the superannuation industry since 1999. Prior to joining AIST, Nick was a consultant for KPMG and spent seven years developing and conducting professional development programs for the Australian Administration Services. He holds a Diploma of Superannuation and has a keen interest in all aspects of financial services. More recently, Nick has been actively involved in developing education content for all the recent reforms and for many of AIST's annual conference programs.

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Cathy Deehan

Senior Training Consultant

Cathy is a qualified workplace trainer and assessor who joined AIST in January 2011. A qualified mathematics teacher, Cathy has worked in a variety of financial service roles since 1999. Cathy holds an Advanced Diploma in Financial Planning and has previously worked as a financial planner with State Super Financial Services and OHM Australia specialising in retirement planning, personal insurances and SMSF strategies. Cathy has also held positions with UniSuper and Plum Financial Services in member education. More recently, Cathy has obtained further qualifications in eLearning design and is a Kirkpatrick Certified (Bronze Level) assessor.

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Tim Ironside

Training Consultant

Tim is a qualified workplace trainer and assessor who joined AIST in October 2011. Tim has worked in a variety of financial service roles since 1999, including member services, employer and planner account management, member education and single issue financial advice. Previous employers include Mercer, AMP, MLC and AvSuper. Tim holds an Advanced Diploma of Superannuation, a Diploma of Financial Planning and more recently has obtained certification as a Kirkpatrick Certified (Bronze Level) assessor.

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- Client Services
- Trustee
- Fund Executive
- Compliance / Specialist
- Fund Operations / Services
- Financial Planning / Advisor

RG146 for the superannuation industry

The RG146 qualification is widely considered to be an essential prerequisite for most careers in the superannuation industry. AIST's superannuation-specific course will provide you with an overview of the laws, regulations, taxation and other key issues affecting superannuation, financial advice and insurance. Topics include the history of superannuation; rules on benefit payments; how super is taxed and why; compliance obligations; understanding retirement incomes streams; asset classes and investment vehicles; estate planning and the financial planning process; and the latest policy updates.

This diploma level course may be completed as a standalone subject or combined with Insurance for the Superannuation Industry and Investment for the superannuation industry to attain a Diploma of Superannuation (FNS50711).

ASIC regulation specifies that those providing advice in superannuation, or in a financial planning context, must be RG146 compliant.

MORE INFORMATION

Location:	All state- Self study and interactive online also available
Duration:	Facilitated 3 days + exam
Early bird prices:	AIST member \$1,670 (GST exempt) non-AIST member \$2,070 (GST exempt)
Standard prices:	AIST member \$1,837 (GST exempt) non-AIST member \$2,277 (GST exempt)
CPD (hours):	24

Course Designed for:



Group discounts apply. Contact AIST for more information

Insurance for the superannuation industry

This diploma level course will provide you with a better understanding of the structures, regulations and designs of insurance products within superannuation. Topics include how insurance interrelates with superannuation; an overview of the legislative and regulatory landscape; underwriting and risk assessment; how to assess death and disability claims; and dispute resolution.

This course meets nationally recognised units of competency. It may be completed as a standalone subject or combined with AIST's superannuation-specific RG146 and Investment for the superannuation industry to attain a Diploma of Superannuation (FNS50711).

MORE INFORMATION

Location:	All states- Self study also available
Duration:	3 days + exam
Early bird prices:	AIST member \$1,670 (GST exempt) non-AIST member \$2,070 (GST exempt)
Standard prices:	AIST member \$1,837 (GST exempt) non-AIST member \$2,277 (GST exempt)
CPD (hours):	18

Course Designed for:



Group discounts apply. Contact AIST for more information

Investment for the superannuation industry

Covering both basic and advanced investment concepts, this course aims to deepen your understanding of how superannuation is invested. Suitable for people at all levels of the industry, topics include basic investment terminology; understanding asset classes, selecting and monitoring fund managers; and strategic asset allocation.

This diploma-level course meets nationally recognised units of competency. It may be completed as a standalone subject or combined with AIST's superannuation-specific RG146 and Insurance for the superannuation industry to attain a Diploma of Superannuation (FNS50711).

MORE INFORMATION

Location:	All states- Self study also available
Duration:	3 days + exam
Early bird prices:	AIST member \$1,670 (GST exempt) non-AIST member \$2,070 (GST exempt)
Standard prices:	AIST member \$1,837 (GST exempt) non-AIST member \$2,277 (GST exempt)
CPD (hours):	18

Course Designed for:



Group discounts apply. Contact AIST for more information

RG146 refresher workshop


AIST's RG146 Refresher is a half-day facilitated training course designed for people who are already RG146 compliant.

The superannuation industry is constantly changing: with the introduction of new legislation and regulatory requirements affects everything from investing and estate planning through to member confidence in the system.

This course helps you main your status as RG146 compliant by keeping you up to date with all the recent key industry changes as well as those set to take effect in the near future. It is also an opportunity to revisit key RG146 topics.

It is recommended that you refresh your RG146 annually.

MORE INFORMATION

Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$530 (incl. GST) non-AIST member \$640 (incl. GST)
Standard prices:	AIST member \$583 (incl. GST) non-AIST member \$704 (incl. GST)
CPD (hours):	3
Course Designed for:	


Group discounts apply. Contact AIST for more information

Investment principles

Get a better understanding of the basic principles behind investment decisions and how to align investment strategies to your own fund in this interactive workshop. Learn how to evaluate economic trends and market developments; identify potential market sectors for investment; and how to use different analytical techniques to form an opinion.

This course is recommended for trustee directors and those working in roles that require an understanding of - and ability to articulate - a fund's investment strategy and performance.

MORE INFORMATION


Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$800 (incl. GST) non-AIST member \$1,000 (incl. GST)
Standard prices:	AIST member \$880 (incl. GST) non-AIST member \$1,100 (incl. GST)
CPD (hours):	6
Course Designed for:	

Group discounts apply. Contact AIST for more information

Assessing TPD & Death Benefit claims

This course gives you the skills and knowledge to process and handle the assessment of TPD and death benefit claims with the view to improving your fund's service levels and reputation. Topics include an overview of the Superannuation Complaint Tribunal's role in reviewing member complaints and a review of actual TPD and death benefit case studies.

MORE INFORMATION

Location:	All states
Duration:	3.5 hours
Early bird prices:	AIST member \$670 (incl. GST) non-AIST member \$830 (incl. GST)
Standard prices:	AIST member \$737 (incl. GST) non-AIST member \$913 (incl. GST)
CPD (hours):	3
Course Designed for:	

Group discounts apply. Contact AIST for more information

Professional Development workshop

This quarterly series of half-day Professional Development (PD) workshops are designed for superannuation fund professionals in member and employer-facing roles.

The series focuses on enhancing both personal and professional skills to help you be more effective in your job and satisfy your compliance requirements. Session topics are designed to keep you up to date with the latest industry developments and include:

- Investments and Super
- Developing strategic client relationships
- Ethics in Super and non-financial aspects of retirement
- Retirement income streams and aged care
- Communicating your points of difference

PD workshops are run at venues around Australia. Session dates and times for 2013 are already available and the session topics will be updated as they are released throughout the year.

Course Designed for:



PROFESSIONAL DEVELOPMENT WORKSHOP - QUARTER 1 (APRIL)

Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$530 (incl. GST) non-AIST member \$640 (incl. GST)
Standard prices:	AIST member \$583 (incl. GST) non-AIST member \$704 (incl. GST)
CPD (hours):	3

Group discounts apply. Contact AIST for more information

PROFESSIONAL DEVELOPMENT WORKSHOP - QUARTER 2 (JUNE)

Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$530 (incl. GST) non-AIST member \$640 (incl. GST)
Standard prices:	AIST member \$583 (incl. GST) non-AIST member \$704 (incl. GST)
CPD (hours):	3

Group discounts apply. Contact AIST for more information

PROFESSIONAL DEVELOPMENT WORKSHOP - QUARTER 3 (SEPTEMBER)

Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$530 (incl. GST) non-AIST member \$640 (incl. GST)
Standard prices:	AIST member \$583 (incl. GST) non-AIST member \$704 (incl. GST)
CPD (hours):	3

Group discounts apply. Contact AIST for more information

PROFESSIONAL DEVELOPMENT WORKSHOP - QUARTER 4 (NOVEMBER)

Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$530 (incl. GST) non-AIST member \$640 (incl. GST)
Standard prices:	AIST member \$583 (incl. GST) non-AIST member \$704 (incl. GST)
CPD (hours):	3





Group discounts apply. Contact AIST for more information

Nil Advice - how to stick to the facts

Providing non-compliant financial advice can be detrimental for the member and may result in legal consequences for the fund.

This half-day workshop provides you with the confidence and tools to use factual information to resolve member queries. Topics include the different levels of advice given to members; the queries that could lead you to give the wrong level of advice; and strategies on how to help members without putting you or their retirement savings at risk.

MORE INFORMATION




Location:	All states
Duration:	3 hours
Early bird prices:	AIST member \$530 (incl. GST) non-AIST member \$640 (incl. GST)
Standard prices:	AIST member \$583 (incl. GST) non-AIST member \$704 (incl. GST)
CPD (hours):	3
Course Designed for:	   

Group discounts apply. Contact AIST for more information

Superstarter - an introduction to super

Designed for those who have recently entered the superannuation industry, this interactive one-day workshop will provide all the essentials needed to kick off a super career in a wide range of roles - from administration and customer service through to payroll and human resources. Superstarter will help you make sense of the jargon, acronyms and complexity that is typical of the super industry. Topics covered include introduction to superannuation; contributions to super funds; investment; withdrawal of superannuation benefits; and insurance.

MORE INFORMATION


Location:	All states
Duration:	6 hours
Early bird prices:	AIST member \$790 (incl. GST) non-AIST member \$970 (incl. GST)
Standard prices:	AIST member \$869 (incl. GST) non-AIST member \$1,067 (incl. GST)
CPD (hours):	6
Course Designed for:	  

Group discounts apply. Contact AIST for more information

Defined Benefit

Defined benefit funds operate in a completely different way to accumulation funds. If you work with a defined benefit scheme, this course will assist you to understand the unique governing rules and concepts used in this sector of the superannuation industry. Topics include defined benefit designs; contribution rules; the role of the actuary; investment; and benefit payments.

MORE INFORMATION

Location:	All states
Duration:	6 hours
Early bird prices:	AIST member \$850 (incl. GST) non-AIST member \$1,050 (incl. GST)
Standard prices:	AIST member \$935 (incl. GST) non-AIST member \$1,155 (incl. GST)
CPD (hours):	6
Course Designed for:	

Group discounts apply. Contact AIST for more information

Fast track your Diploma of Financial Planning

The Diploma of Financial Planning qualification is the industry standard prerequisite to provide advice in a financial planning. This is stipulated by ASIC Tier 1 requirements in RG146.

This course meets the competency standards and ASIC requirements for Tier 1 personal advice in Financial Planning; Managed Investments; Life Insurance; General Insurance; Superannuation; Generic Knowledge; and Skills.

If you have completed RG146 for the Superannuation industry or Diploma of Superannuation, exemptions from several of the topics listed above will be granted to fast track your study to achieve a Diploma of Financial Planning.

MORE INFORMATION

Location:	All states- Self-study – online / distance / correspondence
Duration:	Self paced
Price:	Contact AIST
CPD (hours):	Contact AIST

This qualification is endorsed by AIST and is fully owned and offered by Pinnacle Financial Services Academy



Tailored and in-house training

Can't find a course that's right for you? AIST's experienced and highly-qualified education team builds programs to suit you and your fund's needs. We pitch our delivery to the right audience and we take a flexible approach to all aspects including location, time and value for money. When you invest in AIST Education, you can be assured that we are dedicated to professional development and your fund's business success. Customized programs in the past include 'Creating a compliance culture' and 'Super from the employer's perspective'.

MORE INFORMATION

Location:	All states
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Contact AIST Education via training@aist.asn.au
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The Australian Institute of Superannuation Trustees (AIST) is the peak representative body of Australia's \$500 billion not-for-profit superannuation sector. AIST's members are the trustee directors and staff of industry, corporate and public-sector superannuation funds, who manage the superannuation accounts of almost two-thirds of the Australian workforce.