Delivery and design

The qualification combines Massey University's academic prestige and rigour with Kaplan Professional's financial services education and corporate expertise. This ensures your learning is focused on practical and relevant outcomes directly applicable to your professional practice.

The qualification is delivered 100% online in KapLearn – Kaplan Professional's innovative and user-friendly learning hub. KapLearn contains a number of interactive and engaging study resources to enhance your online learning experience.

Entry requirements

You must have an entrance to university qualification (either through Bursaries and Scholarship Examinations, NCEA, New Zealand University Entrance, Admission with Equivalent Status, Discretionary Entrance or Adult Admission*).

**Applicants who are 20 years of age or older, who do not have a university entrance qualification, are eligible for entry, provided places are available.*

Duration and intakes

You will have 12 months to complete the qualification from your initial enrolment date. Intakes commence every second month (January, April, June, August, October, December).

"The content was focused on scenarios you can relate to in the workplace rather than just academic theory."

- Sam Knight

MASSEY UNIVERSITY
TE KUNENGA KI PŪREHUROA
UNIVERSITY OF NEW ZEALAND
MASSEY BUSINESS SCHOOL
TE KURA WHAI PAKIHI

KAPLAN PROFESSIONAL

CERTIFICATE IN FINANCIAL ADVICE

Equivalent to New Zealand Certificate in Financial Services (Level 5) [Version 2]

Do you need to meet the requirements for providing financial advice?

Complimentary tailored 12-month CPD subscription and access to financial services-focused short courses included.

www.massey.ac.nz/certificate-in-financial-advice/

MASSEY UNIVERSITY TE KUNENGA KI PŪREHUROA UNIVERSITY OF NEW ZEALAND | MASSEY BUSINESS SCHOOL TE KURA WHAI PAKIHI

QS World University Rankings 2020 Business & Management Studies TOP 300

QS World University Rankings 2020 Accounting & Finance TOP 200

SHANGHAI RANKING

AACSB ACCREDITED

Certificate in Financial Advice

Massey University has partnered with Kaplan Professional, Australia's leading and largest provider of financial services education, to deliver the premium online Certificate in Financial Advice.

This qualification is equivalent to the New Zealand Certificate in Financial Services (Level 5) [Version 2], which is the benchmark qualification you need to meet the legal requirements for providing financial advice in New Zealand under the new regime that came into force on 15 March 2021.

Learning outcomes

- Apply legal, ethical and professional financial advice conduct obligations to clients
- Develop a range of financial advice solutions for clients by applying knowledge of the impact of current economic and financial indicators
- Demonstrate appropriate quantitative and qualitative research in developing suitable financial advice solutions

Subjects

The Certificate in Financial Advice consists of one (1) compulsory subject and one (1) elective subject as a specialisation aligned to your professional practice.

Compulsory

125.179 Introduction to Financial Advice (30 credits)

Elective subjects (choose one)

125.143 Essentials of Investment Advice (30 credits)

125.155 Essentials of Insurance Advice – life, disability and health (30 credits)

125.156 Essentials of Insurance Advice – general (30 credits)

125.163 Essentials of Residential Property (30 credits)

You must complete a total of 60 credits to successfully meet the completion requirements of this qualification.

Additional elective subjects (specialisations) can be added for $900 each.

On successful completion of this qualification, you will meet the new requirements for providing financial advice in New Zealand, as set in the Code of Professional Conduct for Financial Advice Services. The competencies and capabilities in this qualification are equivalent to the relevant Level 5 outcomes and it has been independently validated by the Skills Organisation (Skills). The Financial Markets Authority (FMA) has been notified of the outcome.

This comprehensive enrolment package offers the most complete offering and value in the market.

Certificate in Financial Advice qualification + Complimentary tailored 12-month CPD subscription to Ontrack (**value $500**) + Complimentary access to eight financial services-focused short courses (**value $500**) = **$1,800**

($2,800 total value)

P: **0800 859 849**
E: **courseadvice@kaplan.edu.au**
www.massey.ac.nz/certificate-in-financial-advice/