

FINANCIAL SERVICES – Stage 6

FNS30122 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 who perform duties relating to administrative, clerical and customer service roles in banking, credit management, insurance and retail financial services. Individuals at this level apply knowledge and skills to demonstrate autonomy and judgement and to take limited responsibility in known situations under general supervision

This course is competency based and the student's performance is assessed against prescribed industry standards.

Unit Value	2 unit Preliminary 2 unit HSC	240 hrs	Work Placement	Mandatory 70 hours
Specialisation	No		SBAT	Opportunity to complete a School Based Traineeship and gain credit towards the HSC
HSC Exam	Yes	ATAR	Yes	Recognition
				National AQF and HSC Qualification

Example of Competencies.

Unit Code	Unit Title	Unit Code	Unit Title
FNSINC311	Work together in the financial services industry	FNSRTS308	Balance cash holdings
BSBXCM301	Engage in workplace communication	BSBINS309	Maintain business records
BSBOPS305	Process customer complaints	FNSACM313	Process authorised payments
FNSACC323	Perform financial calculations	FNSACM312	Reconcile financial transactions
BSBTEC302	Design and produce spreadsheets	FNSRTS311	Provide customer service in a retail agency
FNSACC321	Process financial transactions and extract interim reports	FNSFLT311	Develop and apply knowledge of personal finances

PERSONAL ATTRIBUTES

- Able to work methodically, accurately and neatly
- Good oral and written communication skills
- Able to work as part of a team
- Neat personal appearance

LEARNING OUTCOMES

- Use the Microsoft Office suite, with a strong focus on Microsoft Word and Microsoft Excel
- Establish client relationships and analyse client needs
- Process customer complaints and resolve disputes
- Use industry standard systems
- Perform financial calculations and reconcile financial transactions
- Monitor and control customer accounts

STUDY PATHWAYS

- Certificate IV in Accounting and Bookkeeping
- Diploma of Accounting

CAREER PATHWAYS

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

- Bank Officer
- Credit and Loans Officer
- Customer Service Officer (Financial Services)
- Insurance Officer
- Trust and Estate Officer
- Loan Assistant

SKILLS FOR SUCCESS



SKILLS FOR LIFE