



**Media Release**

**29th February 2008**

**AFA Launches Pathway to FChFP & Announces a JV with PS146 as Education Provider.**

The AFA today released it's Pathway to FChFP (Fellow Chartered Financial Practitioner) & also announced that financial services educator, PS146 Training Australia, has been appointed as the education provider for its range of courses.

"This is a huge step forward for the AFA," said AFA President ,Dennis Bateman.

"The Australian community needs access to good quality advice by advisers who understand their needs & can work with them over the long term. The FChFP pathway program is focussed on delivering better training & education to AFA members that will enable them to deliver better advice outcomes to Australian consumers," said Bateman

"The Pathway will consist of 4 Courses that will help advisers deliver better outcomes to their clients. The courses focus on practical skills that will assist advisers & their practices to focus on a range of skills & outcomes that are lacking in the market the market, said Jim Taggart, AFA Chair of Education.

The Four Units are and include:

- Ethics & compliance in Practice
- Client Engagement & Advice
- Understanding, Applying & Implementing Financial Solutions
- Managing an Advice Business

"These Units are focused on sustainable advice skills," said Jim Taggart. "The adviser of the future needs a broad range of skills, expertise & experience & this pathway program is looking to provide this to members of the AFA, said Taggart.

## **AFA Announces a JV with PS146 as Education Provider.**

“The AFA is very pleased to announce the JV with PS 146. They understand the Industry, they understand advisers & they understand the AFA “ said AFA CEO Richard Klipin

“They are a specialist training group that understands our industry & we believe they will deliver the program that our members will need to help them provide quality advice now & into the future.” Klipin said.

“PS 146 Training Australia is delighted to partner with the AFA for this critical project” said Mark Sinclair, CEO of PS 146 Australia.

“The AFA has a very clear vision for the future of Advice & advisers & they share with PS146 the passion & enthusiasm for the Industry” said Sinclair.

“The post nominal – FChFP – should come at the end of extensive study that brings the real world into the learning experience to fully prepare AFA members. Our graduates will add value because the classroom and real world of common sense are embedded in our educational philosophy,” said Richard Klipin, CEO of the AFA.

### **The 4 Pillars of AFA Education –**

Pillar 1 : Formal Education

Pillar 2 : Peer to peer learning & education.

Pillar 3: Ongoing Professional Development.

Pillar 4 ; Experience.

### **The AFA is seeking to build the following adviser skills through its training:**

- Sustainable advice skills
- Strong business management skills
- Strong technical skills in area of speciality
- Clear understanding of markets and products
- Risk insurance skills
- Retirement Planning Advice
- Strong client empathy skills
- Strong numeracy skills
- Coaching and mentoring skills
- Client engagement skills
- Superannuation Advice
- Investment Advice

### **Media Enquiries**

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