



Australian Government

FNS50515 Diploma of Personal Trustees

Release 2

FNS50515 Diploma of Personal Trustees

Modification History

Release	Comments
Release 2	This version released with FNS Financial Services Training Package version 1.1 Release 2 created to correct typographical error
Release 1	This qualification first released with FNS Financial Services Training Package version 1.0

Qualification Description

This qualification reflects the job role of individuals working in organisations offering personal trustee services. At this level individuals are expected to apply theoretical and specialised skills in a range of situations and to display initiative and judgement in completing activities. They have autonomy in performing complex technical work and can be responsible for planning, coordinating and evaluating the work of others within broad but generally well-defined parameters.

Licensing/Regulatory Information

Work functions in the occupational areas where this qualification may be used are subject to regulatory requirements. Registered trustee services are licensed. Refer to the FNS Implementation Guide Companion Volume or the relevant regulator for specific guidance on requirements.

Entry Requirements

Nil

Packaging Rules

Total number of units = 11

6 core units plus

5 elective units

The elective units consist of:

- 3 from the electives below.

Of the remaining 2 units:

- up to 2 may be from the electives
- up to 2 may be from Certificate IV, Diploma or Advanced Diploma in any currently endorsed Training Package or accredited course.

The elective units chosen must be relevant to the work outcome and meet local industry needs.

Core Units

BSBINM401 Implement workplace information system

FNSCUS502 Monitor client requirements

FNSINC401 Apply principles of professional practice to work in the financial services industry

FNSPRT501 Advise clients on trust structures

FNSPRT502 Advise clients in estate planning

FNSPRT503 Assess, allocate and supervise work within the personal trustee sector

Elective Units

BSBLED501 Develop a workplace learning environment

BSBMGT502 Manage people performance

BSBMGT605 Provide leadership across the organisation

BSBMKG501 Identify and evaluate marketing opportunities

BSBSUS501 Develop workplace policy and procedures for sustainability

FNSFPL506 Determine client requirements and expectations

Qualification Mapping Information

Code and title current version	Code and title previous version	Comments	Equivalence status
FNS50515 Diploma of Personal Trustees	FNS50511 Diploma of Personal Trustees	Updated to meet Standards for Training Packages.	Equivalent qualification

Links

Companion volumes are available from the IBSA website:

http://www.ibsa.org.au/companion_volumes - http://www.ibsa.org.au/companion_volumes