



Australian Government

**Assessment Requirements for FNSBNK513
Provide business advisory services within a
financial services context**

Release: 1

Assessment Requirements for FNSBNK513 Provide business advisory services within a financial services context

Modification History

Release	Comments
Release 1	<p>This version first released with the FNS Financial Services Training Package Version 8.0.</p> <p>Supersedes and is equivalent to FNSBNK503 Provide business advisory services within a financial services context.</p>

Performance Evidence

The candidate must demonstrate the ability to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including evidence of the ability to:

- provide business advisory services to at least two clients.

In the course of the above, the candidate must:

- develop a business relationship with each client
- advise client on potential business opportunities using client usage patterns, market and community data
- assist client to develop business plans, manage cash flow and negotiate service rates
- match financial products, solutions and services to meet the specific business needs of client.

Knowledge Evidence

The candidate must be able to demonstrate knowledge to complete the tasks outlined in the elements, performance criteria and foundation skills of this unit, including knowledge of:

- methods to create and maintain business relationships with individuals, organisations and communities
- methods to identify business opportunities using client usage patterns, market and community data
- methods to develop business plans, manage cash flow and negotiate service rates
- key financial products, solutions and services that meet client needs
- methods of seeking client referrals for future business opportunities.

Assessment Conditions

Skills in this unit must be demonstrated in a workplace or simulated environment where the conditions are typical of those in a working environment in this industry.

This includes access to:

- office equipment, technology, software and consumables
- financial services product and service information
- clients requiring business advisory services
- organisational policies, procedures and process documentation.

Assessors of this unit must satisfy the requirements for assessors in applicable vocational education and training legislation, frameworks and/or standards.

Links

Companion Volume Implementation Guide is found on VETNet -
<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>