



**Australian Government**

**Department of Education, Employment and Workplace Relations**

# **FNS30710 Certificate III in Life insurance**

**Revision Number: 1**

## **FNS30710 Certificate III in Life insurance**

### **Modification History**

Not applicable.

### **Description**

This qualification is designed to reflect the role of persons carrying out work in life insurance in a range of organisations. Possible work functions may include:

- processing and issuing policies
- responding to customer enquiries and maintaining a customer database
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### **Pathways Information**

#### **Qualification Pathway**

The primary pathway from this qualification is employment in life insurance job roles including:

- administration
- providing customer service

This qualification is suited to an Australian Apprenticeship pathway.

A further learning pathway utilising qualifications such as FNS41510 Certificate IV in Life Insurance would support career progression.

### **Licensing/Regulatory Information**

Not applicable.

### **Entry Requirements**

Not applicable.

## Employability Skills Summary

<b>EMPLOYABILITY SKILLS QUALIFICATION SUMMARY</b>	
<b>Employability Skill</b>	<b>Industry/enterprise requirements for this qualification include:</b>
Communication	<ul style="list-style-type: none"> <li>conducting research to collect and analyse information and present in report form</li> <li>having the ability to question, clarify and evaluate information</li> <li>investigating and negotiating to resolve disputes</li> <li>liaising with internal and external personnel with an ability to 'read' verbal and non-verbal body language</li> <li>using a range of techniques and sales skills to elicit feedback from customers</li> <li>using specialist language in written and oral communication</li> <li>writing in a range of styles to suit different audiences</li> </ul>
Teamwork	<ul style="list-style-type: none"> <li>receiving feedback on performance</li> <li>referring matters to nominated person as required</li> <li>working as a member of a team and applying knowledge of one's own role to achieve team goals</li> </ul>
Problem Solving	<ul style="list-style-type: none"> <li>collecting, comparing and contrasting data in order to create reports</li> <li>investigating skills to provide information to assist with the determination of entitlements for persons where estates are to be finalised</li> <li>using problem solving tools and techniques to balance and reconcile amounts</li> </ul>
Initiative and Enterprise	<ul style="list-style-type: none"> <li>contributing to solutions to workplace challenges</li> <li>contributing to the designing and preparation of reports to effectively present workplace information</li> <li>identifying cross-selling opportunities</li> </ul>
Planning and Organising	<ul style="list-style-type: none"> <li>contributing to the planning process by researching and validating information relating to estates</li> <li>planning work considering resources, time and other constraints</li> <li>processing routine documents and maintaining files, managing information, and scheduling and coordinating competing tasks</li> <li>undertaking contingency planning and risk management to meet client needs within area of responsibility</li> </ul>
Self-management	<ul style="list-style-type: none"> <li>managing own time and priorities and dealing with contingencies</li> <li>operating within codes of ethics, codes of professional conduct, legislation and regulations</li> </ul>

<b>EMPLOYABILITY SKILLS QUALIFICATION SUMMARY</b>	
	<ul style="list-style-type: none"> <li>taking responsibility as required by work role and ensuring all organisational policies and procedures are followed</li> </ul>
Learning	<ul style="list-style-type: none"> <li>acquiring and applying knowledge of services and organisational policies and procedures</li> <li>asking questions to clarify instructions</li> <li>seeking advice on technical issues</li> <li>using on-line help and manuals to solve basic technology problems</li> </ul>
Technology	<ul style="list-style-type: none"> <li>using electronic communication devices and processes such as internet, software packages and email, to produce written correspondence and reports</li> <li>using technology to assist the management of information and to assist the planning process</li> </ul>

## Packaging Rules

### Packaging Rules

**13 units** must be achieved.

#### **8 core units**

*plus 5 elective units*

- all required elective units of competency may be selected from the elective bank below
- a maximum of 2 electives may be selected from units aligned to Certificate III qualifications in any endorsed Training Package or accredited course
- a maximum of 2 electives may be selected from units aligned to Certificate IV qualifications in any endorsed Training Package or accredited course

Elective units must be relevant to the work outcome, local industry requirements and the qualification level.

Units selected from other Training Packages or accredited courses must not duplicate units selected from or available within the FNS10 Financial Services or BSB07 Business Services Training Packages.

#### *Core units of competency:*

- BSBOHS303B Contribute to OHS hazard identification and risk assessment
- BSBWOR203A Work effectively with others
- BSBWOR204A Use business technology

- FNSINC301A Work effectively in the financial services industry
- FNSINC402A Develop and maintain in-depth knowledge of products and services used by an organisation or sector
- FNSISV302A Process alteration to insurance policy
- FNSISV310A Process claims payments
- FNSILF301A Process and issue a life insurance policy

*Elective units of competency:*

- BSBCCO201A Action customer contact
- BSBCMM301A Process customer complaints
- BSBCUS301A Deliver and monitor a service to customers
- BSBCUS403A Implement customer service standards
- BSBRKG304B Maintain business records
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