



**Australian Government**

# **Assessment Requirements for FNSSAM311 Provide ancillary products and services that meet client needs**

**Release: 1**

## Assessment Requirements for FNSSAM311 Provide ancillary products and services that meet client needs

### 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 FNSSAM301 Identify opportunities for cross-selling products and services.</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:

- identify and provide fact-based information on at least one ancillary product and one service that meet client needs, for at least two different clients.

### 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:

- techniques for building customer relations and providing ancillary products and services
- key features of finance industry and organisational policies and procedures required to provide ancillary products and services
- key features of a range of financial products and services offered by or through an organisation, including:
  - interest rates
  - terms
  - special packages
- requirements of relevant legislation, regulations and industry codes of practice, including:
  - requirement to act in the best interests of the customer
  - potential and/or actual impact on information requested or provided.

### 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:

- financial services product information
- organisational policies and procedures
- clients requiring financial ancillary products or services
- office equipment, technology, software systems and its relevant data and consumables.

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>