



Australian Government

Assessment Requirements for FNSSAM511 Apply advanced techniques to sell financial products and services

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 6.0.

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:

- apply advanced selling techniques to sell at least two financial products and at least two financial services.

In the course of the above, the candidate must:

- complete required documentation according to organisational policies and procedures.

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:

- organisational policies and procedures related to selling financial products and services
- legislative and regulatory requirements related to selling financial products and services
- advanced selling techniques and selling approaches
- processes for monitoring and reviewing a selling approach
- sales training and development programs for salespeople
- evaluation and monitoring techniques for financial products and services, their strengths and weaknesses and selling approach
- techniques for generating new and innovative ideas for selling financial products and services
- opportunities for cross selling products and services
- organisational documentation processes
- techniques to calculate and estimate numerical and financial data.

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 and product information
- organisational policies and procedures and legislation
- office equipment, technology, software systems 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>