



Australian Government

Assessment Requirements for FNSSUP601 Liaise with and support trustees

Release: 1

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Modification History

Release	Comments
Release 1	This version first released with FNS Financial Services Training Package Version 1.0.

Performance Evidence

Evidence of the ability to:

- determine trustee requirements and provide support to trustees
- make recommendations to trustees and implement their decisions
- monitor specialist services and make recommendations for improvement to fund service and performance.

Note: If a specific volume or frequency is not stated, then evidence must be provided at least once.

Knowledge Evidence

To complete the unit requirements safely and effectively, the individual must:

- identify the communication and documentation requirements of trustees
- outline documentation management requirements
- explain the key compliance and reporting requirements of legislation and regulation relating to:
 - superannuation
 - taxation
 - corporations
- compare and contrast industry products and services
- outline key features of organisational procedures for:
 - ensuring compliance
 - managing specialist services
 - performance management
- explain risk management strategies
- discuss the role and responsibilities of trustees
- identify and outline timeframe requirements for compliance reports for specialist services.

Assessment Conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the superannuation field of work and include access to:

- common office equipment, technology, software and consumables
- organisational financial records
- organisational policy and procedures
- legislation and regulatory information.

Assessors must satisfy NVR/AQTF assessor requirements.

Links

Companion Volume implementation guides are found in VETNet -

<https://vetnet.gov.au/Pages/TrainingDocs.aspx?q=c7200cc8-0566-4f04-b76f-e89fd6f102fe>