

Classroom Based Training Plan



RTO Details

Name	Traineeship Management Australia
RTO Address	Suite 203/134-136 Cambridge St, Collingwood
Contact Person	Stefan Rosman
Position	Administration Coordinator
Contact No.	03 9419 3400

Structured Training

Proposed Commencement Date	
Proposed Completion Date	

Employer Details

Name	NA
Address	NA
Contact Person	NA
Position	NA
Contact No.	NA

Student Details

Student Name	
Qual Code	FNS50315
Qual Name	Diploma of Finance and Mortgage Broking Management
Delta No.	NA
Vettrak No.	
FT /PT / SBNA	NA

* Training Delivery Mode Key	WPB	Workplace Based	OTJ	On job	Special Delivery and Assessm't Reqs in ref to Pre-Training Review:
	CD	Classroom Delivery	OFJ	Off job	
	OL	On-line (Internet Based)			Combined Delivery Details:

I have completed a pre-training review and have contributed to development of this plan. I am aware of my responsibility to ensure that this plan and its ongoing development is implemented and monitored over the duration of the Training Contract.	Trainer/Assessor Signature		Student Signature	
	Name	Stefan Rosman	Name	
	Date		Date	

Competencies					Proposed		Actual				Outcome		Assessor Signature
Unit Code	Unit Name	Nominal Hours	Scheduled Hours	Proposed Commence-ment Date	Proposed Completion Date	Actual Commencement Date	Training Delivery Modes*	Assessment Methods #	Trainer / Assessor Name^	C, NYC, CT or RPL	Date		
BSBCUS301	Deliver and Monitor a Service to Customers	35	35				CD	4 5 6	AT				
BSBITU306	Design and Produce Business Documents	80	80				CD	4 5 6	AT				
BSBRSK401	Identify Risk and Apply Risk Management Processes	50	50				CD	4 5 6	AT				
FNSCUS501	Develop and Nurture Relationships with Clients, Other Professionals and Third Party Referrers	50	50				CD	4 5 6	AT				
FNSCRD301	Process Applications for Credit	20	20				CD	4 5 6	AT				
FNSFMB401	Prepare Loan Application on Behalf of Finance or Mortgage Broking Clients	30	30				CD	4 5 6	AT				
FNSFMB402	Provide Finance and Mortgage Broking Services	40	40				CD	4 5 6	AT				
FNSFMB403	Present Broking Options to Client	40	40				CD	4 5 6	AT				
FNSFMB501	Settle Applications and Loan Arrangements in the Finance and Mortgage Broking Industry	30	30				CD	4 5 6	AT				
FNSFMB502	Identify and Develop Complex Broking Options for Client	60	60				CD	4 5 6	AT				
FNSFMB503	Present Broking Options to Client with Complex Needs	50	50				CD	4 5 6	AT				
FNSFMB504	Implement Complex Loan Structures	50	50				CD	4 5 6	AT				
FNSFMK505	Comply with Financial Services Legislation and Industry Codes of Practice	80	80				CD	4 5 6	AT				
FNSINC401	Apply Principles of Professional Practice to Work in the Financial Services Industry	30	30				CD	4 5 6	AT				
FNSINC402	Develop and Maintain In-Depth Knowledge of Products and Services Used by an Organisation or Sector	40	40				CD	4 5 6	AT				
FNSRSK501	Undertake Risk Identification	40	40				CD	4 5 6	AT				
FNSRSK502	Assess Risks	40	40				CD	4 5 6	AT				
FNSSAM403	Prospect for New Clients	30	30				CD	4 5 6	AT				
No Units: 18	Total Nominal Hours	795	795										

