

## Certificate III in Financial Services FNS30107

This program provides the key skills needed for people working in the Financial Services sector when collecting, including how to handle difficult customer situations and keeping credit accounts on track.

The program is designed for people who do not have a lot of experience in credit or who have been working in a limited capacity in the field of credit. Many people end up working in credit without formal training. They may be the office 'all rounder', they may have transferred from another area such as customer service or they may have 'grown' with the company and their role has expanded into credit.

Whatever the reason they are now working in credit, it is essential that they have the opportunity to develop the skills, knowledge and confidence to do their roles well. This will then ensure that the organisation is compliant with relevant legislation as well as offering increased customer service and satisfaction to both your internal and external customers.

### How the program works

To gain a Certificate III in Financial Services, students will need to complete 13 units of competency.

**Components 1, 2 & 3** address the requirements for all units.

### Delivery Options

The program will be offered in a face-to-face format.

The public program will be available in Sydney, Brisbane and Melbourne Adelaide & Perth.

Each component is one day (8hrs) together with post component assessment.

Corporate programs can also be provided and delivered on site. For more information for corporate programs, contact AICM Learning Services [education@aicm.com.au](mailto:education@aicm.com.au)

### For further information, please contact:

AICM Learning Services

Suite 202, 619 Pacific Highway, ST LEONARDS, NSW 2065

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Website: [www.aicm.com.au](http://www.aicm.com.au)



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### Program Outline

#### Component 1 – Key Collection Skills

This program is designed to help participants plan and prepare prior to making collection calls.

The preparation involves not only collecting the information pertinent to the customer, but also developing the correct 'attitude' to building positive and proactive relationships. Participants are encouraged to understand and apply their companies' policies and procedures whilst complying with relevant codes of practice and legislation such as the Privacy Act and S.60 of the Trade Practices Act (collections). In addition, having a positive attitude enables participants to utilise the key skills in the program when dealing with different customer situations. Identifying the different reasons why customers become angry, threaten and abuse or avoid calls, helps in developing tactics to overcome objections.

#### Course Objectives

- Develop an understanding of your industry and the way it operates by improving your understanding of your organisation's policy and procedures.
- Develop communication skills that will help you develop the right attitude and provide you with effective and appropriate methods for interacting with your internal and external customers.
- Improve your understanding of how to prepare effectively for a telephone call to collect debts.
- Enhance your skills for dealing with difficult customer service situations.

#### The units to be addressed are:

FNSCRDT303B	Monitor and control accounts
FNSICCUS302B	Process customer complaints
FNSICIND301B	Work in the financial services industry
FNSICCUS301B	Respond to customer enquiries



## Component 2 - Effective Debt Collection

This program offers participants the skills and knowledge to efficiently process credit applications whilst reinforcing the importance of complying with relevant legislation and codes of practice. Participants are taken through the credit application process with explanations and discussion on 'why' the information is requested and are able to appreciate how important their role in credit is and the impact that outstanding debts may have. Teamwork and time management are also covered. A well functioning team provides the organisation with a great customer service image to both internal and external customers .

### Course Objectives

At the end of this program you should be able to:

- Understand the procedure for application for credit
- Know the process of verifying the information
- Determining a credit limit
- Establishing securities
- Identify methods to monitor accounts
- Enhance skills for processing of journals
- Enhance skills with technology in the workplace
- Develop methods for innovation and supporting change
- Develop methods of working with others for maximum efficiency
- Improve time management skills to identify procrastination, time wasting habits, distractions and diversions in workplace practices.
- Understand the process of control of the ledger
- Plan the collection process
- Manage the steps of recovery action
- Understand the allocation process of accounts receivable entries
- Prepare Journal entries

### The units to be addressed are:

FNSCRDT301B	Process applications for credit accounts
FNSICACC307B	Reconcile & monitor accounts receivable
FNSICACC306B	Process journal entries
BSBCMN302B	Organise personal work priorities and development



### **Component 3 – Effective Workplace Skills**

This component will address skills and knowledge relating to the Financial Services industry and topics relating to good practice in the workplace concerning:

- The legal context for working in the financial services industry;
- Health and safety;
- Communication;
- Use of technology; and
- Preparing reports.

#### **The units to be addressed are:**

FNSICGEN304B	Apply health and safety practices in the workplace
FNSICGEN301B	Communicate in the workplace
FNSISGEN303B	Work with others
FNSICGEN302B	Use technology in the workplace
FNSICIND401B	Apply principles of professional practice to work in the financial services industry



## Nomination Form 2008 Certificate III in Financial Services FNS30107

**Tick required course and location, complete details and fax to 02 9906 5686**

Sydney  Melbourne  Brisbane  Adelaide  Perth

	AICM Member	Non Member
<b>Certificate III in Financial Services- FNS30107</b>	<b>\$1530</b> <input type="checkbox"/>	<b>\$2025</b> <input type="checkbox"/>
<i>To gain a Certificate III in Financial Services you must complete all three components. Each component requires one day (8hrs) face to face training. Total 24 hrs formal training.</i>		

<b>Key Collection Skills</b>	<b>Comp 1</b>	<b>\$ 510</b> <input type="checkbox"/>	<b>\$ 675</b> <input type="checkbox"/>
<b>Effective Debt Collection</b>	<b>Comp 2</b>	<b>\$ 510</b> <input type="checkbox"/>	<b>\$ 675</b> <input type="checkbox"/>
<b>Effective Workplace Skills</b>	<b>Comp 3</b>	<b>\$ 510</b> <input type="checkbox"/>	<b>\$ 675</b> <input type="checkbox"/>

First Name ..... Last Name .....

Company .....

Mailing Address ..... Post Code .....

Telephone.....Fax..... Mobile .....

Email..... Special Dietary requirements.....

Will you be undertaking this training under a Traineeship arrangement?  Tick if under 18 yrs

- I wish to be put on the waitlist for the marked courses above (you will be contacted the month prior to the course)
- I wish to enrol now. (A letter confirming your enrolment & tax invoice/receipt will be sent to your mailing address)

**Payment methods**

Please find **enclosed cheque** of \$.....

**OR** Please note: All credit card payments are subject to a 3% surcharge

Visa / MasterCard / Amex / Diners #.....Expires...../.....

Cardholders Name (Printed).....Signature.....

**OR**

EFT payment – Bank details: **Commonwealth Bank, Artarmon NSW - BSB: 062 104 Account: 1003 9560** (please quote name)

**OR**

Invoice - Student ? Signature .....

\* Company ? \* Person responsible for payment - Signature ..... Print name .....

General Information

Training is conducted from 9.00 am to 5.00 pm and it is recommended that you arrive 15 mins prior to commencement. All fees are due and payable before commencement of training. Participants receive documentation and textbooks with each component undertaken. Lunch, morning tea and afternoon teas are included in the fee for face to face programs. Students undertaking courses may gain access to their records upon request in writing to the AICM National Office.

Cancellation/Refund Policy

If any enrolment is cancelled between 7 & 14 days prior to commencement, a refund of 50% will be made.  
Cancellations received less than 7 days before commencement are non refundable.  
Any course may be cancelled by AICM if insufficient participants are registered and a full refund will be made in such cases.

Privacy

Personal details will remain in confidence and in accordance with the Australian Institute of Credit Management's privacy policy.  
**Copyright**  
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**Liability**  
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AUSTRALIAN INSTITUTE OF CREDIT MANAGEMENT

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