



APPLICATION FORM

for

Recognition of Prior Learning (RPL)

in the

Certificate IV in Banking Services FNS41010

Qualification

All correspondence to: **PO Box 489 ~ DARLINGHURST NSW 1300**
Level 1 ~ 13-15 Wentworth Avenue ~ SYDNEY NSW 2000

Tel: **02 9283 5999** ~ Fax: **02 9283 5999** ~ e-mail: **IFSoffice@ifs-inc.com.au** ~ Website: **www.ifs-inc.com.au**
ABN: 98 697 095 230

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Who is the Institute of Financial Services (IFS)?

The Institute of Financial Services Inc. was established in 1955 as a professional 'not for profit' association. It is a government Registered Training Organisation (RTO) delivering training and qualifications to the financial services industry. See our web site for more information: www.ifs-inc.com.au.

What is Recognition of Prior Learning (RPL)?

RPL is an assessment process that recognises competencies you currently have, regardless of how, when or where the learning occurred. This includes competencies attained through any combination of formal or informal training and education, work experience or general life experience.

In order to apply for RPL, you must provide evidence that addresses and meets the requirements for each unit of competency.

Credit transfers recognise any formal qualifications you have achieved through a Registered Training Organisation or higher education institution eg a TAFE or a university. You will need to provide a JP (or equivalent) certified copy of the qualification/s and a list of the units of competency achieved. These must match the units you are seeking exemptions for.

An IFS trainer/assessor may need to contact you to discuss your application for RPL or to obtain further information from you, to be able to accurately assess your submitted evidence.

To be able to grant RPL, the assessor must be confident that you are currently competent against all elements of the competency/ies and must ensure that submitted evidence is authentic, valid, reliable, current and sufficient.

How does the RPL process work?

Evidence that is presented by the applicant is assessed against each unit of competency applied for. The evidence is assessed using the following criteria:

- Is the prior learning relevant to the course?
- Is the knowledge and skill current?
- Is it authentic and can it be verified?
- Is the knowledge and skill appropriate to Diploma level of competency?

How long will it take to be informed of the outcome of my application?

You will be notified of the outcome within 2-4 weeks of the RPL application being received by us.

How much will my RPL application cost?

The fee for an application for RPL for the full qualification is **\$1,200**.

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Applicant's Contact Details

Surname: _____ **Sex:** Male Female

Given Names: _____ **Date of Birth:** ____ / ____ / ____

Employer: _____

Business Address: _____

Daytime Telephone: _____ **Fax:** _____

Email Address: _____

I am paying the \$1,200 fee by Credit Card:

Please tick if a receipt is required

My Credit Card details are as follows:

Deduct \$1,200 for RPL fee from:

MASTERCARD VISA

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Expiry: ____ / ____

Signature: _____ **Cardholder's Name:** _____

I declare that the information/evidence that I am submitting with this RPL application is truthful and all copies of documents have been certified by a Justice of the Peace.

I understand that if I am required to undertake some training and assessment to complete any skill/s gap/s identified in the RPL process, that additional fees will apply.

Applicant's Signature: _____ **Date:** _____

Please send all documents to:

**RPL Applications
IFS
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Unit of Competency: FNSASIC301C – Establish client relationship and analyse needs	Evidence
<ul style="list-style-type: none"> • Establish relationship with client • Identify client' objectives, needs and financial situation • Analyse client's objectives, needs, financial situation and risk profile <p>Knowledge Required (Generic)</p> <ul style="list-style-type: none"> • <i>the economic environment and characteristics and impact of economic and business cycles including: interest rates, exchange rates, inflation, government monetary and fiscal policies</i> • <i>the operation of financial markets, the roles played by intermediaries and issuers, structure and inter-relationships within the financial markets, and inter-relationship between industry sectors</i> • <i>financial products, including: the concept of a financial product, general definition, specific inclusions and exclusions, types of financial investment products, types of financial risk products</i> • <i>taxation issues in relation to the products and markets in which they operate</i> • <i>advisory functions, including: the role of the representative or adviser, participants in the advisory services market, range of services provided, profile and financial information of the client, appropriateness of a risk assessment</i> • <i>the legal environment and disclosure and compliance, including: relevant legal principles (e.g. Corporations Act, Financial Services Reform Act (FSRA), Trade Practices Act), the relationship between ethics and regulatory requirements (e.g. good faith, utmost good faith, full disclosure of remuneration/fees and any other conflicts of interest which may influence the adviser's recommendation)</i> • <i>relevant industry codes of practice and conduct</i> • <i>complaints resolution procedures (internal and external)</i> • <i>ASIC regulatory guidelines</i> 	

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Knowledge Required (Specialist)

- *the specific industry or product in which they are operating. For general insurance products this includes:*
 - *types of general insurance products/policies*
 - *standard cover (and deviations)*
 - *policy wording,*
 - *taxes and charges*
 - *insurance claims*
 - *premium rating/risk selection*
 - *reporting*
 - *product development*
 - *underwriting*
- *for deposit products and non-cash payment facilities this includes:*
 - *types of products/facilities,*
 - *product/facility characteristics*

Skills Required

- *communication skills to:*
 - *determine and confirm client requirements, using questioning and active listening as required*
 - *present products and services to clients clearly and thoroughly*
 - *negotiate agreed outcomes with clients*
 - *use language and concepts appropriate to cultural differences*
- *numeracy and IT skills to:*
 - *identify and use financial product information*
 - *access and use appropriate software such as spreadsheets and databases*
 - *use internet information*
- *literacy skills for analysing information and products to ensure appropriateness to client needs, currency and accuracy*
- *analytical skills to determine client risk profiles and undertake a needs analysis*
- *interpersonal skills to establish rapport with clients and to liaise with other team members*
- *organisational and time management skills to sequence tasks, meet timelines and arrange meetings*

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Unit of Competency: FNSASIC302C – Develop, present and negotiate client solutions	Evidence
<ul style="list-style-type: none"> • Develop appropriate strategies and solutions • Present appropriate strategies and solutions to client • Negotiate financial plan, policy or transaction with client • Coordinate implementation of agreed plan, policy or transaction • Complete and maintain necessary documentation • Provide ongoing service where requested by client <p>Knowledge Required (Generic)</p> <ul style="list-style-type: none"> • <i>the economic environment and characteristics and impact of economic and business cycles including: interest rates, exchange rates, inflation, government monetary and fiscal policies</i> • <i>the operation of financial markets, the roles played by intermediaries and issuers, structure and inter-relationships within the financial markets, and inter-relationship between industry sectors</i> • <i>financial products, including: the concept of a financial product, general definition, specific inclusions and exclusions, types of financial investment products, types of financial risk products</i> • <i>taxation issues in relation to the products and markets in which they operate</i> • <i>advisory functions, including: the role of the representative or adviser, participants in the advisory services market, range of services provided, profile and financial information of the client, appropriateness of a risk assessment</i> • <i>the legal environment and disclosure and compliance including:</i> <ul style="list-style-type: none"> ○ <i>relevant legal principles (e.g. Corporations Act, Financial Services Reform Act (FSRA), Trade Practices Act)</i> ○ <i>the relationship between ethics and regulatory requirements (e.g. good faith, utmost good faith, full disclosure of remuneration/fees and any other conflicts of interest which may influence the adviser's recommendation)</i> • <i>relevant industry codes of practice and conduct</i> • <i>complaints resolution procedures (internal and external)</i> • <i>ASIC regulatory guidelines</i> 	

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 - *types of products and facilities*
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Unit of Competency: FNSCUS402A – Resolve disputes	Evidence
<ul style="list-style-type: none"> • Establish that a dispute exists • Investigate the dispute and determine the action to be taken • Resolve dispute • Finalise dispute <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>current industry compliance requirements and dispute settling procedures and requirements</i> • <i>current organisation policy and procedures and any impacting legislation for dispute resolution</i> • <i>negotiation principles and practises</i> • <i>risk prevention methods</i> <p>Skills Required</p> <ul style="list-style-type: none"> • <i>well-developed communication skills to:</i> <ul style="list-style-type: none"> ○ <i>determine and confirm dispute situation and resolution requirements, using questioning and active listening as required</i> ○ <i>negotiate effectively and respectfully</i> ○ <i>liaise with others, share information, listen and understand</i> ○ <i>use language and concepts appropriate to cultural differences</i> • <i>research and analysis for:</i> <ul style="list-style-type: none"> ○ <i>accessing, interpreting and managing dispute documentation and related information</i> ○ <i>accessing and interpreting financial product information</i> • <i>literacy skills to read and interpret documentation from a variety of sources and recording, gathering and consolidating information</i> • <i>IT skills for accessing and using appropriate software such as spreadsheets and databases and using internet information</i> • <i>team working skills for working cooperatively and effectively with others</i> • <i>problem solving skills to address negotiation and related dispute resolution issues</i> • <i>judgement skills for forming recommendations in operational situations</i> • <i>organisational skills, including the ability to plan and sequence work and plan meetings</i> 	

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Unit of Competency: BSBCUS403A – Implement customer service standards	Evidence
<ul style="list-style-type: none">• Contribute to quality customer service standards• Implement customer service systems• Implement team customer service standards <p>Knowledge Required</p> <ul style="list-style-type: none">• <i>detailed product or service knowledge</i>• <i>models of customer service</i>• <i>relevant organisational procedures and standards for customer service relationships</i> <p>Skills Required</p> <ul style="list-style-type: none">• <i>communication skills to explain the system and standards to the work team</i>• <i>language, literacy and numeracy skills to understand and interpret customer service standards to others, and to modify these standards as required</i>• <i>problem-solving skills and lateral thinking skills to address problems and to ensure service standards are met</i>	

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Unit of Competency: BSBCUS401A – Coordinate implementation of customer service strategies	Evidence
<ul style="list-style-type: none"> • Advise on customer service needs • Support implementation of customer service strategies • Evaluate and report on customer service <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:</i> <ul style="list-style-type: none"> ○ <i>anti-discrimination legislation</i> ○ <i>ethical principles</i> ○ <i>codes of practice</i> ○ <i>privacy laws</i> ○ <i>environmental issues</i> ○ <i>occupational health and safety (OHS)</i> • <i>principles of customer service</i> • <i>organisational business structure, products and services</i> • <i>product and service standards and best practice models</i> <p>Skills Required</p> <ul style="list-style-type: none"> • <i>literacy skills to read a variety of texts, to prepare general information and papers, and to write formal and informal letters according to target audience</i> • <i>planning skills to develop implementation schedules</i> • <i>problem-solving skills to diagnose organisational problems relating to customer services</i> 	

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Unit of Competency: FNSSAM401A – Sell financial products and services	Evidence
<ul style="list-style-type: none"> • Identify the nature of the enquiry • Determine the suitability of the customer for the financial product or service • Provide customer with information about the product or service • Confirm sale and process documentation <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>basic structure and operation of the financial services industry</i> • <i>company policies and procedures for interacting with customers and solving problems</i> • <i>relevant legislation and regulations impacting on the financial services industry</i> • <i>selling techniques</i> • <i>the range of products and services available from an organisation including terms, interest rates, special packages and other conditions</i> <p>Skills Required</p> <ul style="list-style-type: none"> • <i>communication skills to:</i> • <i>determine and confirm client requirements, using questioning and active listening as required</i> • <i>sell products and services</i> • <i>refer clients and liaise with others, share information, listen and understand</i> • <i>use language and concepts appropriate to cultural differences</i> • <i>IT skills for accessing and using appropriate software such as spreadsheets and databases and using internet information</i> • <i>literacy skills for analysing information and products to ensure appropriateness to client needs, currency and accuracy</i> • <i>interpersonal skills to establish rapport with clients and to liaise with other team members</i> • <i>problem solving skills to address client product or service issues</i> • <i>teamwork skills</i> • <i>organisational skills, including the ability to plan and sequence work</i> 	

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Unit of Competency: FNSSAM402A – Implement a sales plan	Evidence
<ul style="list-style-type: none">• Implement promotional strategy• Prepare distribution channels• Monitor and review sales plan implementation <p>Knowledge Required</p> <ul style="list-style-type: none">• <i>marketing techniques and market trends</i>• <i>products and services provided by the organisation</i>• <i>sales and promotion techniques</i>• <i>training strategies</i> <p>Skills Required</p> <ul style="list-style-type: none">• <i>communication skills to:</i><ul style="list-style-type: none">○ <i>determine and confirm sales planning requirements, using questioning and active listening as required</i>○ <i>liaise with others, share information, listen and understand</i>○ <i>use language and concepts appropriate to cultural differences</i>• <i>IT skills for accessing and using appropriate software such as spreadsheets and databases and using internet information</i>• <i>well-developed literacy skills to:</i><ul style="list-style-type: none">○ <i>analyse information and products to ensure appropriateness to client needs, currency and accuracy</i>○ <i>draft clear and accurate sales plans and supporting documentation</i>• <i>problem solving skills to address product or service selling issues</i>• <i>teamwork skills and skills to identify training needs and opportunities</i>• <i>organisational skills, including the ability to plan and sequence work</i>• <i>marketing skills</i>	

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Unit of Competency: BSBOHS303B – Contribute to OHS hazard identification and risk assessment	Evidence
<ul style="list-style-type: none"> • Contribute to workplace hazard identification • Gather information about workplace hazards • Contribute to OHS risk assessment <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>appropriate methods for data collection</i> • <i>basic principles of incident causation and injury processes</i> • <i>concepts of risks, factors that affect risk and difference between a hazard and a risk</i> • <i>consequences and likelihood of risks associated with hazards in the workplace</i> • <i>formal and informal communication processes</i> • <i>internal and external sources for OHS information and data</i> • <i>key personnel in the workplace</i> • <i>legislative requirements for:</i> <ul style="list-style-type: none"> ○ <i>consultation and communication</i> ○ <i>information and data collection</i> ○ <i>notification of incidents</i> ○ <i>record keeping</i> ○ <i>reporting of incidents</i> ○ <i>specific hazards</i> • <i>limitations and subjectivity of generic hazard and risk checklists, and risk ranking processes</i> • <i>nature of workplace processes and hazards relevant to the workplace</i> • <i>organisational culture as it impacts on the workgroup</i> • <i>organisational design and structure</i> • <i>organisational policies and procedures regarding OHS</i> • <i>relevant state/territory/commonwealth OHS legislation, codes of practice, standards and guidance material</i> • <i>types and characteristics of major physical, chemical, biological, radiological, nuclear mechanical, psychosocial and environmental hazards which may be present in the workplace</i> • <i>types of hazard registers</i> 	

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- *research skills to investigate the effectiveness of workplace practices and processes, to review workplace practices, processes and data, and to draw relevant inferences*
- *literacy skills to prepare summary reports and memos for a range of target groups including:*
 - *employees*
 - *OHS committees*
 - *OHS representatives*
 - *managers*
 - *supervisors*
- *organisational and time management skills to sequence tasks and meet timelines*
- *communication skills to contribute effectively on hazard identification risk assessment processes*

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Unit of Competency: BSBWOR204A – Use business technology	Evidence
<ul style="list-style-type: none"> • Select and use technology • Process and organise data • Maintain technology <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>key provisions of relevant legislation from all levels of government that may affect aspects of business operations, such as:</i> <ul style="list-style-type: none"> ○ <i>anti-discrimination legislation</i> • <i>ethical principles</i> <ul style="list-style-type: none"> ○ <i>codes of practice</i> ○ <i>privacy laws</i> ○ <i>occupational health and safety (OHS)</i> • <i>organisational policies, plans and procedures, especially in regard to file-naming and storage conventions</i> • <i>organisational IT procedures including back-up and virus protection procedures</i> • <i>basic technical terminology in relation to reading help-files and manuals</i> <p>Skills Required</p> <ul style="list-style-type: none"> • <i>literacy skills to identify work requirements; to understand and process basic, relevant workplace information; and to follow written instructions</i> • <i>communication skills to request advice, to receive feedback and to work with a team</i> • <i>problem-solving skills to solve routine technology problems</i> 	

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Unit of Competency: BSBWOR501A – Manage personal work priorities and professional development	Evidence
<ul style="list-style-type: none">• Establish personal work goals• Set and meet own work priorities• Develop and maintain professional competence <p>Knowledge Required</p> <ul style="list-style-type: none">• <i>principles and techniques involved in the management and organisation of:</i><ul style="list-style-type: none">○ <i>performance measurement</i>○ <i>personal behaviour, self-awareness and personality traits identification</i>○ <i>personal development plan</i>○ <i>personal goal setting</i>○ <i>time management</i>• <i>management development opportunities and options for self</i>• <i>organisation's policies, plans and procedures</i>• <i>types of learning style/s and how they relate to the individual</i>• <i>types of work methods and practices that can improve personal performance</i> <p>Skills Required</p> <ul style="list-style-type: none">• <i>communication skills to receive, analyse and report on feedback</i>• <i>literacy skills to interpret written and verbal information about workplace requirements</i>• <i>organisational skills to set and achieve priorities</i>	

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Unit of Competency: FNSINC401A – Apply principles of professional practice to work in the financial services industry	Evidence
<ul style="list-style-type: none"> • Identify the scope, sectors and responsibilities of the industry • Identify and apply financial services industry guidelines, procedures and legislation • Identify sustainability issues for the financial services industry • Manage information • Participate in and facilitate work team activities • Plan work to be completed taking into consideration time, resources and other constraints • Develop and maintain personal competency <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>environmental or sustainability legislation, regulations and codes of practice applicable to industry and organisations</i> • <i>industry and organisation policies and procedures and ethical behaviours in regard to customer service and administration</i> • <i>industry and organisation security practices and rationale</i> • <i>internal administration systems such as accounting systems and databases</i> • <i>principles, practices and available tools and techniques of sustainability management relevant to the industry context</i> • <i>relevant legislation and statutory requirements and industry codes of practice including:</i> <ul style="list-style-type: none"> ○ <i>Consumer Credit Code</i> ○ <i>Privacy Act</i> ○ <i>Credit Act</i> ○ <i>Financial Transaction Reports Act</i> ○ <i>Corporations Act (including Accounting Standards)</i> ○ <i>Financial Services Reform Act (FSRA)</i> • <i>the economic and political climate relating to the financial industry</i> 	

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- *well-developed communication skills to:*
 - *determine and confirm work requirements, using questioning and active listening as required*
 - *relate to clients/customers and determine their needs*
 - *liaise with others, share information, listen and understand*
 - *use language and concepts appropriate to cultural differences*
- *well-developed numeracy and IT skills to:*
 - *undertake a wide range of financial calculations*
 - *use appropriate software for complex tasks such as specialist industry information management systems, word processors, spreadsheets and databases*
 - *access, evaluate and use internet information*
- *research and analysis skills for accessing interpreting and managing information*
- *well-developed literacy skills to read and interpret documentation from a variety of sources and recording, gathering and consolidating financial information*
- *teamwork skills to work effectively and cooperatively with others and provide team leadership as required*
- *planning skills to implement environmental and energy efficiency policies and procedures relevant to the organisation*
- *organisational and time management skills to sequence tasks, meet timelines and arrange meetings*
- *learning skills to:*
 - *maintain knowledge of changes to organisation and industry requirements and expectations*
 - *comply with the most current legislative, regulatory and ethical requirements*
- *judgement skills for forming recommendations in operational situations*
- *problem solving skills to identify any issues that have the potential to impact on the work role or outcome and to develop options to resolve these issues when they arise*
- *self-management skills for complying with ethical, legal and procedural requirements*

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Unit of Competency: FNSINC402A – Develop and maintain in-depth knowledge of products and services used by an organisation or sector	Evidence
<ul style="list-style-type: none"> • Identify the products and services the organisation uses • Identify compliance implications of product • Determine the appropriate users for products and services • Maintain product knowledge <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>approaches to selling products and services such as:</i> <ul style="list-style-type: none"> ○ <i>advertisements</i> ○ <i>seminars</i> ○ <i>networks</i> ○ <i>direct mail</i> • <i>systems that can be accessed to obtain up-to-date information on products, services and competition such as:</i> <i>internet</i> <ul style="list-style-type: none"> ○ <i>consumer reports</i> ○ <i>financial reviews and conferences</i> ○ <i>events that promote financial products and services</i> • <i>general marketing and promotional techniques such as:</i> <ul style="list-style-type: none"> ○ <i>product placement</i> ○ <i>how to identify strengths and weaknesses</i> ○ <i>how to overcome consumer resistance</i> • <i>organisation policies in terms of promotional and marketing strategies</i> • <i>organisation's products and services and those used by the organisation</i> • <i>products and services used by competitors that are similar to the organisation's</i> 	

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Skills Required

- *well-developed communication skills to:*
 - *determine and confirm customer requirements, using questioning and active listening as required and avoiding unnecessary industry jargon*
 - *liaise with others, share information, listen and understand*
 - *use language and concepts appropriate to cultural differences*
- *research and analysis skills to access, interpret and manage complex product and service information and product characteristics*
- *IT skills to use internet databases and search engines for:*
 - *product information*
 - *consumer reports*
 - *industry information bulletins*
- *well-developed literacy skills for:*
 - *analysing information and products to ensure appropriateness to customer needs, currency and accuracy*
 - *reading and interpreting documentation from a variety of sources and recording, gathering and consolidating financial information*
 - *drafting comprehensive documentation on products and services from a wide range of sources*
- *marketing skills for :*
 - *reading market and consumer trends*
 - *matching relevant products that meet these needs*
 - *communicating the benefits of products and services in a way that informs the market*
 - *identifying different types of customers in the relevant market*
- *learning skills to maintain knowledge of changes to relevant legislation and financial product features*
- *organisational skills, including the ability to plan and sequence work*

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Unit of Competency: BSBMGT405A – Provide personal leadership	Evidence
<ul style="list-style-type: none"> • Influence individuals and teams in a positive manner • Make informed decisions • Enhance the image of the enterprise • Demonstrate high standards of personal and management performance <p>Knowledge Required</p> <ul style="list-style-type: none"> • <i>coaching and mentoring techniques</i> • <i>continuous improvement techniques and processes</i> • <i>enterprise culture and values</i> • <i>enterprise mission, business goals and standards</i> • <i>enterprise policies, procedures and guidelines</i> • <i>operational environment - customer base, company products and services</i> • <i>performance management policies, procedures and systems</i> <p>Skills Required</p> <ul style="list-style-type: none"> • <i>coaching and mentoring skills to encourage and develop team members effectively</i> • <i>communication skills to conduct effective informal and formal meetings, to communicate effectively with personnel at all levels, and to provide effective feedback</i> • <i>effective goal setting skills to be able to set realistic but challenging goals for team members</i> • <i>interpersonal skills to establish rapport and to build relationships with clients, team members and stakeholders</i> • <i>leadership skills to gain the trust and confidence of colleagues and clients</i> • <i>literacy skills to communicate and articulate information and ideas clearly and effectively</i> • <i>organisational skills to lead the team in a methodical and organised manner and in line with to agreed timeframes</i> • <i>problem-solving skills to resolve problems in a systematic and positive manner and to create innovative and effective solutions</i> • <i>team building skills to effectively develop team spirit and morale</i> 	