



Aon's accountant offer

Education requirements

Aon Hewitt Financial Advice

In order to continue providing SMSF advice after 1 July 2016 you need to be licenced, and to be licenced you need to have completed the required education. We recommend that you commence your education courses as soon as possible to ensure that you have completed them all before 30 June 2016, and can continue to provide advice after this date.

This document sets out the education requirements for you to be able to provide advice under either the Essential SMSF or Strategic SMSF offering as an AHFA authorised representative.

The courses are provided through Kaplan and are available via distance education, where you study on your own and complete an on-line exam and possibly a written assignment. Alternatively workshops are available where you can join like-minded individuals and complete the study in a workshop environment. You will still be required to complete any exam or assignment yourself. The advantage of a workshop delivery is that you will be able to complete the course faster and you are able to share ideas and network with your peers.

Required courses

If a qualified CA, CPA or MIPA	Essential SMSF	Strategic SMSF
Kaplan – Accountants SMSF package*	✓	✓
Kaplan – DFP1a Generic Knowledge subject**	✓ (if AIPA)	✓ (if AIPA)
Kaplan – DFP1b Financial Planning subject		✓***
Kaplan – DFP2 Insurance and Risk Protection		✓
Kaplan – DFP4 Securities and Managed Investments		✓
If not a qualified CA, CPA or MIPA		
Kaplan – DFP1 Foundations to Financial Planning (This is made up of DFP1a and DFP1b)	✓	✓
Kaplan – DFP2 Insurance and Risk Protection		✓
Kaplan – DFP3 Superannuation and Retirement Planning	✓	✓
Kaplan – DFP4 Securities and Managed Investments		✓
Kaplan SMSF course	✓	✓

* The Kaplan Accountants SMSF package is only available to CPAs, CAs and MIPAs. It provides competency in Superannuation and SMSF, the Generic Knowledge component is exempted.

** The Kaplan Accountants SMSF package is also available to AIPAs, however DFP1a Generic Knowledge subject must be completed first.

*** CPAs, CAs and MIPAs can be exempted for the Generic Knowledge component of DFP1.

Cost of individual courses

Name of course	Distance education (Aon price)	Workshop (approx. price)
Kaplan – Accountants SMSF package	\$490	\$490 + \$500 = \$990
Kaplan – DFP1a Generic knowledge subject [#]	\$100	Not available
Kaplan – DFP1b Financial Planning subject	\$270	\$270 + \$250 = \$520
Kaplan – DFP1 Foundations to Financial Planning (This is made up of DFP1a and DFP1b)	\$490	\$490 + \$500 = \$990
Kaplan – DFP2 Insurance and Risk Protection	\$490	\$490 + \$500 = \$990
Kaplan – DFP3 Superannuation and Retirement Planning	\$490	\$490 + \$500 = \$990
Kaplan – DFP4 Securities and Managed Investments	\$490	\$490 + \$500 = \$990
Kaplan SMSF course	\$490	\$490 + \$500 = \$990

[#] DFP1a Generic knowledge subject is only available to those who qualify to complete the Accountants SMSF package but do not qualify for the exemption of this subject. For example AIPAs.

The cost of a workshop is \$250 per day. As such a one day workshop costs \$250, while a two day workshop costs \$500.

Total cost of courses under each option

	Distance education (Aon price)	Workshop (approx. price)
If a qualified CA, CPA or MIPA		
Essential SMSF	\$490	\$990
Strategic SMSF	\$1,740	\$3,490
If not a qualified CA or CPA		
Essential SMSF	\$1,470	\$2,970
Strategic SMSF	\$2,450	\$4,950

^{**} The Kaplan Accountants SMSF package is also available to AIPAs, however DFP1a Generic Knowledge subject must be completed first, which increases the cost by \$100 per option. The DFP1a Generic Knowledge subject is not available as a workshop.

For more information on your training requirements please contact:

Caz Garrard
 Manager Learning & Development
 02 9253 7218
 caz.garrard@aonhewitt.com