

# AIST Education Course Guide

---

# 2018



AUSTRALIAN INSTITUTE of  
SUPERANNUATION TRUSTEES

## *Professionally develop your way to the top*

Research shows that a planned approach to skills development helps you move up the career ladder more quickly and in a direction of your choosing. In fact, one recent study found that 68 per cent of workers identified training and development as the most important workplace policy.

As the super industry evolves, so do the roles within it. Upskilling – or simply refreshing – can lead to new ideas, increased efficiency and, ultimately, better results both for you and your organisation.

Ongoing professional development is also important to ensure you and your fund are across new industry regulations, the latest technology developments and current thinking and best practice across a range of subject matter.

Designed specifically for professionals working in profit-to-member super funds, AIST's annual calendar of courses, along with our training partnerships with the Australian Institute of Management (AIM), the Association of Data-driven Marketing & Advertising (ADMA) and Deakin University, provide a full suite of learning programs for AIST members and the broader super sector.

AIST is committed to helping you develop your skills. If you or any of your colleagues require advice on professional development, we are here to assist you – we are only a phone call away.

Good luck with your training endeavours.



**Maryann Mannix-White**  
Chief Membership Officer  
Australian Institute of Superannuation Trustees

# CONTENTS

## COURSES FOR TRUSTEES, CEOS AND EXECUTIVES

### Trustee Director Course

Build your Expertise	4
Enhance your Excellence	4
Trustee Director Masterclasses	5
In-House Board Briefings	5

## COURSES FOR FUND STAFF

<b>FNS50715 Diploma of Superannuation</b>	6
RG146 for the Superannuation Industry	6
Insurance for the Superannuation Industry	6
Investment for the Superannuation Industry	7
Professional Development Series	8
RG146 Refresher	9
Superstarter – an Introduction to Superannuation	9
Assessing TPD & Death Benefit Claims	10
Facts, Information and General Advice	10

## DEVELOPING YOUR YOUNG PROFESSIONALS

AIST Super Grads Program	11
Young Super Network	12

## RECOGNISE YOUR TRAINING

AIST Accreditation Program	13
----------------------------	----

## TRAINING PARTNERSHIPS

AIST's Training Partnerships	14
------------------------------	----

## TAILORED AND IN-HOUSE TRAINING

Can't find a course that's right for you? AIST's experienced and highly-qualified education team can build programs to suit you and your fund's needs. We pitch our delivery to your audience and take a flexible approach to all aspects including location, time and value for money. When you invest in AIST education, you can be assured that we are dedicated to professional development and your fund's business success.

Group discounts apply. Contact AIST for more information.

Contact the AIST Education team via [training@aist.asn.au](mailto:training@aist.asn.au)

# COURSES FOR TRUSTEES, CEOS AND EXECUTIVES

## TRUSTEE DIRECTOR COURSE

AIST's flagship educational offering – the Trustee Director Course – recognises the unique role that superannuation trustee directors have in providing a better retirement outcome for working Australians.

The flexible delivery of the Trustee Director Course means participants can complete the full course in 5 days or break it down into individual days across any time period. Participants can also choose to attend individual days of the Trustee Director Course at any time to address specific professional development needs.

Facilitated by AIST and industry experts, each program is delivered via a combination of interactive case studies and practical 'real life' learning experiences.

### BUILD YOUR EXPERTISE

The essential requirement for directors and fund executives in superannuation.

#### COURSE OUTLINE

The role and responsibilities of a trustee director are different to a corporate director. This course will develop competence in the regulatory environment of superannuation, trustee director responsibilities, understanding how super fund boards work and analysing super fund board reports.

#### KEY TOPICS:

- The superannuation industry
- Trustee director duties and obligations
- Superannuation fund operations
- The risk framework
- Interpreting financial statements
- Introduction to investment principles
- The trustee board
- Analyse board reports

---

<b>Location:</b>	All states
<b>Duration:</b>	5 days (also available as individual modules)
<b>Full Course Price:</b>	\$8,650 + GST
<b>Individual Modules Prices:</b>	Full day: \$1,730 + GST 3/4 day: \$1,295 + GST 1/2 day: \$865 + GST 1/4 day: \$435 + GST
<b>CPD (hours):</b>	36 (upon completion of all assessment requirements)

---

### ENHANCE YOUR EXCELLENCE

For experienced trustee directors wanting more.

#### COURSE OUTLINE

Designed for experienced trustee directors, this course enables participants to become more effective in the boardroom by improving decision-making skills, developing the capacity to lead board discussions and making more valuable contributions to the fund's strategic direction.

Participants will examine the best ways to evaluate the outcomes of board decisions in relation to members' best interests and gain the confidence to challenge boardroom debates.

#### KEY TOPICS:

- The board's role in strategic oversight
- Guide the strategic direction of the fund
- The economic and investment environment
- Managing and monitoring risk
- Investment governance
- Monitoring management
- Board culture and governance

---

<b>Location:</b>	All states
<b>Duration:</b>	5 days (also available as individual modules)
<b>Full Course Price:</b>	\$8,650 + GST
<b>Individual Modules Prices:</b>	Full day: \$1,730 + GST Half day: \$865 + GST
<b>CPD (hours):</b>	40 (upon completion of all assessment requirements)

---

## TRUSTEE DIRECTOR MASTERCLASS SERIES **NEW**

### COURSE OUTLINE

AIST is proud to announce a new masterclass series designed to provide advanced continuing professional development for trustee directors. Presented in a collegiate and interactive forum by highly-qualified experts in governance, investment, education and other specialties, this series of 90 minute masterclasses will challenge and extend directorship expertise.

### KEY TOPICS:

- Understanding the global economy
- Building and maintaining an effective and very high performing Board
- Innovation – targeting the right problem using data
- Agility in taking and managing risk

---

<b>Location:</b>	Melbourne, Sydney & on-demand online
<b>Duration:</b>	90 minutes each (plus an assessment task)
<b>Prices:</b>	Contact AIST – available by subscription for AIST member funds only (Includes face to face attendance for all fund directors and on-demand online access to the full series)
<b>CPD (hours):</b>	1.5 for masterclass session 1 for assessment task

---

## IN-HOUSE BOARD BRIEFINGS

### COURSE OUTLINE

AIST’s popular Board Briefings offer a short, sharp training session that is delivered on demand at your board meetings, so that all Directors can participate. Subject matter can be tailored to your fund’s individual requirements.

### KEY TOPICS:

Topics are decided by your board, however examples include:

- Latest insights from regulatory changes
- Risk culture and your fund
- Strategic planning
- Investment beliefs
- Cyber and digital
- Leadership
- Long-term investing
- Geopolitics

---

<b>Location:</b>	Available in all capital cities at an agreed place and time
<b>Duration:</b>	1–2 hours
<b>Prices:</b>	Contact AIST
<b>CPD (hours):</b>	1 for every hour of training (eg. 2 training hours, 2 CPD hours)

---

*“The AIST Trustee Director Course, Build your expertise was an excellent introduction to the role of a superannuation trustee. The presentations and the written assessment work focused the mind on the critical issues that determine the benefits that members receive from their fund.”*



Sally Evans,  
GAIST,  
Non-Executive Director,  
Opal Specialist Aged Care  
(formerly Head of Retirement, AMP)

*“While I am a long term director on a range of boards I found the course extremely beneficial, if not essential, building focus on the issues faced as a Superannuation Trustee. It was highly educational, enhanced my confidence to represent fund members, and adds to the depth of any board.”*



Greg McLean,  
GAIST,  
Trustee Director, CareSuper

## COURSES FOR FUND STAFF

# FNS50715 DIPLOMA OF SUPERANNUATION

Tailored to those looking to bolster their superannuation industry training and secure a nationally recognised diploma level certification, AIST's Diploma of Superannuation is a solid foundation and highly respected qualification upon which to build your career in super.

These three diploma level courses meet nationally recognised units of competency. They may be completed as standalone subjects or combined to obtain a FNS50715 Diploma of Superannuation.

## RG146 FOR THE SUPERANNUATION INDUSTRY

Complete as a standalone course or as part of the FNS50715 Diploma of Superannuation

### COURSE OUTLINE

RG146 for the Superannuation Industry is widely considered to be an essential prerequisite for many careers in the superannuation industry. This fundamental course is regularly updated to ensure you meet the Australian Securities and Investments Commission's (ASIC) Tier 1 Compliance requirements.

This course is relevant to those currently working in – or aspiring to work in – member-facing roles within profit-to-member super.

### KEY TOPICS:

- The purpose of superannuation
- Receiving contributions
- Paying benefits
- Understanding your legal responsibilities
- The Australian economic environment
- Asset classes and investment vehicles
- Taxation
- Licensing, disclosure and communication requirements
- Insurance
- Retirement income streams
- Social security
- Estate planning & the financial planning process



---

<b>Location:</b>	All states – e-learn also available
<b>Duration:</b>	Facilitated 3 days
<b>Early bird prices:</b>	AIST member: \$1,765 (GST exempt) Non-AIST member: \$2,185 (GST exempt)
<b>Standard prices:</b>	AIST member: \$1,940 (GST exempt) Non-AIST member: \$2,400 (GST exempt)
<b>CPD (hours):</b>	24 (upon completion of all assessment requirements)

---

## INSURANCE FOR THE SUPERANNUATION INDUSTRY

Complete as a standalone course or as part of the FNS50715 Diploma of Superannuation

### COURSE OUTLINE

For those working in insurance roles or if you are a trustee director looking to gain a deeper understanding of your obligations, AIST's Insurance for the Superannuation Industry will provide you with a better understanding of the structure, regulation and design of insurance within profit-to-member super.

This course is relevant to both those currently working in insurance roles as well as those looking to make a career move towards insurance-focused roles within super.

### KEY TOPICS:

- Introduction to insurance
- Legislation and regulatory bodies
- Other insurance considerations for trustees
- Insurance within superannuation
- Insurance benefit design
- Underwriting and risk assessment
- Death and disability claims
- Dispute resolution



---

<b>Location:</b>	All states – self-paced also available
<b>Duration:</b>	Facilitated 2 days
<b>Early bird prices:</b>	AIST member: \$1,765 (GST exempt) Non-AIST member: \$2,185 (GST exempt)
<b>Standard prices:</b>	AIST member: \$1,940 (GST exempt) Non-AIST member: \$2,400 (GST exempt)
<b>CPD (hours):</b>	18 (upon completion of all assessment requirements)

---

Take advantage of AIST's training partnership with Deakin University on page 14.

## INVESTMENT FOR THE SUPERANNUATION INDUSTRY

Complete as a standalone course or as part of the FNS50715 Diploma of Superannuation

### COURSE OUTLINE

With more than half of member queries based around investment decisions, AIST's Investment for the Superannuation Industry course will enable participants to have better conversations with their internal investment teams as well as members by providing an overview of how investment works in the profit-to-member super sector.

This intensive two-day course is relevant to those looking to have deeper investment conversations with members, as well as those with a non-investment background looking to gain more than just a 101 understanding in this important area.

### KEY TOPICS:

- Introduction to investments
- Asset classes
- Investments, economics and regulation
- Managed investment products
- Service providers and market participants
- Asset valuations
- Investment management styles
- Trustee considerations



<b>Location:</b>	All states – self-paced also available
<b>Duration:</b>	Facilitated 2 days
<b>Early bird prices:</b>	AIST member: \$1,765 (GST exempt) Non-AIST member: \$2,185 (GST exempt)
<b>Standard prices:</b>	AIST member: \$1,940 (GST exempt) Non-AIST member: \$2,400 (GST exempt)
<b>CPD (hours):</b>	18 (upon completion of all assessment requirements)

*“Highly informative and practical session.”*

Ian Steel,  
Trustee Director,  
Statewide Super



*“Wonderful support across all areas, including trainer.”*

Antoinette Masiero,  
GAIST, Trustee Director,  
VicSuper



*“I felt very supported by AIST and that is a credit to the team there.”*

Kelly Smith,  
General Manager,  
Admin and Insurance,  
HESTA



*“I recently completed RG146 training conducted by AIST. Not only was the course interesting and informative but I regard it as a must for all superannuation fund employees. I strongly recommend that all participants in superannuation services, whether working for a Fund or a service provider to one, undertake this course.”*

Michael Block,  
Chief Investment Officer,  
Australian Catholic Superannuation



# COURSES FOR FUND STAFF

## PROFESSIONAL DEVELOPMENT SERIES

### COURSE OUTLINE

Designed for superannuation fund professionals in member and employer facing roles AIST's Professional Development (PD) Series consists of four half-day seminars.

Our PD Series focuses on issues identified by members working in the profit-to-member super sector and provides appropriate and relevant Continuing Professional Development (CPD) in a format that is both informative and interactive.

With topics changing annually to keep pace with the rapidly changing superannuation landscape, the PD Series is an effective way of ensuring your ongoing competency on a range of issues impacting your employers and members.

### WORKSHOP 1 – APRIL 2018 BEST PRACTICE IN NEGOTIATING

This dynamic session addresses the key requirements of successful negotiation, providing practical negotiation techniques applicable across a range of situations.

Find out how to prepare ahead for situations that require negotiation and how to apply strategies for identifying mutual gain. This session also outlines the best ways to reach a consensus and set the terms of agreement.

This session will be delivered by AIST and local industry experts in partnership with Professional Development Training (PDT).

#### KEY TOPICS:

- Practical negotiation techniques
- Negotiating concepts
- Using negotiation to persuade and influence
- Dealing with conflict or deadlocks in negotiation plans and progress

### WORKSHOP 2 – JUNE 2018 INSURANCE IN SUPERANNUATION

In this session learn about the Insurance in Superannuation Code and hear the latest regulatory developments relating to insurance from the Productivity Commission, and the Parliamentary Joint Committee in to life insurance. In addition, receive an update on the focus on insurance in the Royal Commission.

#### KEY TOPICS:

- Insurance in Super Code
- Royal Commission focus on insurance
- Productivity Commission recommendations
- Parliamentary Joint Committee report into life insurance

### WORKSHOP 3 – SEPTEMBER 2018 ESTATE PLANNING ESSENTIALS

This workshop will engage participants in a comprehensive session focused on the critical aspects of estate planning and distribution of death benefits.

The workshop will explore the breadth of investigation that must be undertaken to determine the rightful beneficiaries and address the difficult issues that can arise during the process.

Participants will benefit from the valuable insight of Lisa-Marie McKechnie, a specialist financial services lawyer with Mills Oakley.

#### KEY TOPICS:

- Superannuation death benefits and the Trustee decision making process
- Dealing with the financial and medical matters of an acquaintance
- Instructing how estate assets are distributed and to whom

### WORKSHOP 4 – OCTOBER/NOVEMBER 2018 FOCUS ON FINTECH – MIND & MACHINE

This session explores how advanced technologies are affecting services and roles in superannuation and the wider financial services sector. We will examine how IT advances will change the landscape of financial advice, marketing and member engagement.

This session will be delivered by AIST and one of its technology partners.

#### KEY TOPICS:

- Big data, open data, blockchain, machine learning, everything-as-a-service
- Impact on backend processing, administration, advice, member engagement and governance
- Practical ideas to take away from the session

---

<b>Location:</b>	All states	<b>Standard prices:</b>	AIST member: \$560 (incl. GST)	<b>CPD (hours):</b>	3
<b>Duration:</b>	3 hours		Non-AIST member: \$680 (incl. GST)		

---

**These workshops will be accredited for CPD hours by the Financial Planning Association of Australian (FPA). Please note: accreditation does not constitute endorsement.**

## RG146 REFRESHER

### COURSE OUTLINE

The RG146 Refresher is a half-day facilitated training course that is designed for people who are already RG146 compliant. It is recommended that you refresh your RG146 accreditation at least every two years.

AIST's RG146 Refresher provides an overview of recent – and upcoming – changes to super legislation and the regulatory landscape. The course is continually updated to provide delegates with the most relevant and timely information.

### KEY TOPICS:

The content of each workshop will vary to match the current legislation and regulatory changes, however topics may include:

- Update on the economic environment
- Superannuation and the tax system
- Recent legislative changes to superannuation
- Financial advice regulation and disclosure obligations
- Changes to trustee governance obligations
- Investment update

---

<b>Location:</b>	All states
<b>Duration:</b>	3 hours
<b>Early bird prices:</b>	AIST member: \$560 (incl. GST) Non-AIST member: \$680 (incl. GST)
<b>Standard prices:</b>	AIST member: \$615 (incl. GST) Non-AIST member: \$745 (incl. GST)
<b>CPD (hours):</b>	3

---

It is recommended that you refresh your RG146 accreditation at least every two years.

## SUPERSTARTER – AN INTRODUCTION TO SUPERANNUATION

### COURSE OUTLINE

AIST's Superstarter is an introductory course for people who have recently entered the superannuation industry. No previous knowledge or experience is required to attend this course.

A straightforward and interactive workshop, Superstarter will provide all the essentials needed to kick off a career in super. Superstarter will help participants to make sense of the jargon, acronyms and complexity that is typical of the super industry. It will provide an overview of the history and mechanics of superannuation to help you to be more effective in your role.

AIST's Superstarter is deliverable as a full day or a half day workshop. Contact AIST to discuss your needs.

### KEY TOPICS:

- Introduction to superannuation
- Contributions to superannuation funds
- An introduction to Investment
- Withdrawal of superannuation benefits
- Insurance within super overview

---

### ESSENTIAL FACTS – HALF DAY

<b>Location:</b>	All states
<b>Duration:</b>	3 hours
<b>Early bird prices:</b>	AIST member: \$560 (incl. GST) Non-AIST member: \$680 (incl. GST)
<b>Standard prices:</b>	AIST member: \$615 (incl. GST) Non-AIST member: \$745 (incl. GST)
<b>CPD (hours):</b>	3

### COMPREHENSIVE – FULL DAY

<b>Location:</b>	All states
<b>Duration:</b>	6 hours
<b>Early bird prices:</b>	AIST member: \$835 (incl. GST) Non-AIST member: \$1,015 (incl. GST)
<b>Standard prices:</b>	AIST member: \$915 (incl. GST) Non-AIST member: \$1,120 (incl. GST)
<b>CPD (hours):</b>	6

---

## COURSES FOR FUND STAFF

---

### ASSESSING TPD & DEATH BENEFIT CLAIMS

#### COURSE OUTLINE

AIST's Assessing TPD & Death Benefit Claims workshop provides the skills and knowledge needed to develop and implement best practice claims assessment practices.

This half-day course investigates actual member situations considered by the Superannuation Complaints Tribunal (SCT) in reviewing complaints from members. There are many misconceptions involved that highlight the subtleties of determining fair and equitable payments of claims. Participants will gain the skills and knowledge to be able to process and handle the assessment of TPD and death benefit claims with the view to improve their fund's service level and reputation.

#### KEY TOPICS:

- Overview of the insurance claim process and potential outcomes for fund members
- Processing and handling of the assessment of TPD and Death Benefit claims
- The importance of beneficiary nominations and effectively communicate this to fund members
- Distinguish the roles of the SCT and FOS in relation to disputed insurance claims and be aware of the transition of these complaint handling bodies to the Australian Financial Complaints Authority (AFCA)

---

<b>Location:</b>	All states
<b>Duration:</b>	4 hours
<b>Early bird prices:</b>	AIST member: \$710 (incl. GST) Non-AIST member: \$880 (incl. GST)
<b>Standard prices:</b>	AIST member: \$780 (incl. GST) Non-AIST member: \$965 (incl. GST)
<b>CPD (hours):</b>	4

---

### FACTS, INFORMATION AND GENERAL ADVICE

#### COURSE OUTLINE

Providing non-compliant financial advice can be detrimental for the member and may result in legal consequences for the fund.

This half-day workshop provides participants with the skills and tools they need to outline the different types of financial advice defined in the Corporations Act, to provide an overview of advice documentation and to understand best practice in the provision of financial advice.

#### KEY TOPICS:

- The different levels of advice given to members
- Common queries that could lead you to give the wrong level of advice
- Strategies on how help members without putting you or their retirement savings at risk

---

<b>Location:</b>	All states
<b>Duration:</b>	3 hours
<b>Early bird prices:</b>	AIST member: \$560 (incl. GST) Non-AIST member: \$680 (incl. GST)
<b>Standard prices:</b>	AIST member: \$615 (incl. GST) Non-AIST member: \$745 (incl. GST)
<b>CPD (hours):</b>	3

---

## AIST SUPER GRADS PROGRAM

The AIST Super Grads Program provides participating organisations the opportunity to offer university graduates or existing employees a pathway to leadership in the profit-to-member superannuation industry.

### PROGRAM OUTLINE

The program is committed to identifying and developing talented individuals from across the country in a variety of specialist fields to work in the profit-to-member superannuation industry. The program grants organisations access to a vast number of candidates to choose from, or alternatively, can be utilised by an existing staff member.

The 12 month program is aimed at developing young people who are genuinely committed to making a difference to the quality of retirement for all Australians, with an understanding of the underlying ethos of profit-to-member super.

The program is suitable to develop people in a number of roles including investment, marketing and communication, legal and compliance, finance, business development, policy and research, human resources, technology and employer & member engagement.

### THE SUPER GRADS PROGRAM OFFERS:

- A nationally recognised qualification in RG146 for the Superannuation Industry
- Soft-skills training at two separate training and development retreats
- One-week work placements at associated entities
- Access to a formal mentor from the industry
- Attendance at Australia’s largest profit-to-member super conference, the Conference of Major Superannuation Funds (CMSF)
- Networking opportunities with other graduates and senior leaders in the super industry

All AIST member funds and associate members are eligible to participate in the national program.

<b>Duration:</b>	12 months
<b>Prices:</b>	Contact AIST
<b>CPD (hours):</b>	Dependent on the Super Grad’s Professional Development Plan
<b>Program designed for:</b>	Graduates or existing employees on a pathway to leadership
<b>Register interest:</b>	Additional information about the program is available on our website. Register your interest for an AIST representative to get in contact to discuss how the program can meet your organisational development needs. <a href="http://supergrads.aist.asn.au">supergrads.aist.asn.au</a>

*“The Super Grads program is vital if we want to recruit and develop future leaders who understand the history and ethos of the sector and our unwavering focus on member best interests – whether they are employed in investment, member services, governance or communications. The program injects a cohort of impressive, enthusiastic and diverse young people into the sector.”*



Cate Wood,  
Chair – Member Director,  
CareSuper

# DEVELOPING YOUR YOUNG PROFESSIONALS

---

## YOUNG SUPER NETWORK

AIST's Young Super Network (YSN) is an organised community of young professionals working in the superannuation industry. Each year YSN hosts social, educational and professional development events across Australia – facilitating open and creative discussion on industry issues with high calibre guest speakers.

Joining YSN provides access to events throughout the year (many of which provide CPD hours) including lunchtime events with guest speakers and evening networking functions. YSN membership is complimentary for AIST members and caters to the growing number of young professionals in the industry, providing them with topical content on big-picture industry issues and encouraging them to expand their networks within superannuation and the broader financial industry.

YSN currently operates in Melbourne, Sydney, Brisbane, Adelaide and Hobart.

For the full calendar of YSN events and to join, visit [aist.asn.au/young-super-network](http://aist.asn.au/young-super-network).

---

*“The Young Super Network is an invaluable forum for young super professionals to learn and engage with experts, connect with peers, and lay the foundations that will become the collective future of the industry.”*



Miki Crosbie,  
Publications Co-ordinator –  
Marketing and Communications,  
Super SA

## AIST ACCREDITATION PROGRAM

Demonstrate your commitment to your role and the wider superannuation industry with AIST member accreditation.

### PROGRAM OVERVIEW

AIST’s membership accreditation program provides individuals with the prestige of being recognised for the valuable contribution that they have made in their role and to the superannuation industry.

Accreditation demonstrates your experience in the industry as well as your ongoing commitment to upholding higher professional standards by acknowledging the time you spend attending accredited training programs, professional development events and approved courses.

### AIST POST-NOMINALS

AIST offers two post-nominals determined by length of service and industry contribution, Associate of AIST (AAIST) and Fellow of AIST (FAIST).

AIST’s member accreditation framework is outlined below:

Associate of AIST (AAIST)			
Education requirement:	Length of service:	Industry contribution:	Ongoing annual CPD:
RG146 for the superannuation industry  <i>or</i>  Diploma qualification (the qualification does not have to be related to the superannuation or financial services industry).	1 year +	Not applicable.	30 hours per year or 90 hours over a rolling 3 year period.  At least 50% of the CPD hours recorded must be completed with AIST.
Fellow of AIST (FAIST)			
Education requirement:	Length of service:	Industry contribution:	Ongoing annual CPD:
Bachelor degree (any course of study)  <i>or</i>  AIST's Trustee Director Course.	3 years +	An individual will need to submit an application of 100 words or less explaining how they have made a contribution to the industry.	30 hours per year or 90 hours over a rolling 3 year period.  At least 50% of the CPD hours recorded must be completed with AIST.

Application to AIST’s accreditation program is open to all trustee directors and fund professionals working within AIST member funds. It is a complimentary benefit to AIST members – no application fees apply.

For more information and to apply, visit [aist.asn.au/education](http://aist.asn.au/education)

# AIST'S TRAINING PARTNERSHIPS

## LOOKING FOR MORE EDUCATIONAL OPPORTUNITIES? TAKE ADVANTAGE OF AIST'S TRAINING PARTNERSHIPS

AIST understands that many people in the superannuation industry have a range of professional development needs.

To help our members meet their training goals, AIST has partnered with the Australian Institute of Management (AIM), the Association for Data-driven Marketing & Advertising (ADMA) and Deakin University to deliver a range of additional courses specifically for AIST members.

### AIM



AIM is Australia's largest membership organisation for managers and leaders. AIM has provided training to at least half a million people in its 75 year history and is a trusted training partner to over half the companies on the ASX200.

AIM's reputation in delivering soft skills – or interpersonal skills training – makes them an ideal AIST training partner to enhance the skills in your fund.

Adding over 100 courses on a wide range of topics including communication and presentations skills, relationship management, managing client relationships and more, AIST's partnership with AIM can support your range of ancillary training needs.

### ADMA



ADMA is Australia's leading association for data-driven marketers and advertisers. ADMA IQ Education has been created to deliver dedicated education programs that give marketers the practical skills they need to produce highly effective and successful creative marketing, across multiple channels.

With marketing, media and analytics changing fast, ADMA IQ's comprehensive marketing education program provides courses on a range of topics including analytics, content, data, digital marketing, mobile, search and more to meet the needs to your growing member experience programs.

### DEAKIN UNIVERSITY



Recognising the growing pressure on financial advisers to upskill, AIST now provides a pathway from diploma level studies to postgraduate studies, without the requirement for an undergraduate degree.

This new educational initiative – which involves a direct pathway between AIST's FNS50715 Diploma of Superannuation and Deakin University's postgraduate financial planning qualifications – aligns with the recent Financial Adviser Standards and Ethics Authority (FASEA) announcement on guidance for existing financial adviser education standards.

Eligible graduates can use credits towards higher education courses at Deakin University including:

- Graduate Certificate of Financial Planning – one credit of 4 required
- Graduate Diploma of Financial Planning – two credits of 8 required
- Master of Financial Planning – two credits of 16 required.

Programs from both AIM and ADMA can also be tailored and delivered in-house to your teams to provide an exclusive training experience for your fund and teams.

For full details on the courses available and to book, visit [aist.asn.au](http://aist.asn.au) or contact the AIST training team at [training@aist.asn.au](mailto:training@aist.asn.au)

# 2018 EVENT DATES



AIST's annual calendar of superannuation events and conferences are tailored specifically for professionals working in profit-to-member funds.

Activity	Location	Date/s
AIST / IFS Advice Symposium	Sheraton Hotel, Melbourne	Tuesday 20 February
Conference of Major Super Funds (CMSF)	Brisbane Convention & Exhibition Centre, Brisbane	Wednesday 14 – Friday 16 March
Thought Leadership Series – Luncheon	Establishment, Sydney	Tuesday 17 April
Thought Leadership Series – Luncheon	The Hotel Windsor, Melbourne	Thursday 19 April
CEO Forum	AIST offices, Melbourne	Thursday 10 May
Thought Leadership Series – Breakfast	Establishment, Sydney	Tuesday 26 June
Thought Leadership Series – Breakfast	The Hotel Windsor, Melbourne	Thursday 28 June
Member Experience Ideas Exchange	Collins Square, Melbourne	Tuesday 24 July
Employer Engagement Ideas Exchange	Collins Square, Melbourne	Wednesday 25 July
Chairs Forum	Parliament House, Canberra	Monday 13 August
CEO Forum	First State Super offices, Sydney	Friday 31 August
AIST Super Investment Conference (ASI)	Cairns Convention Centre, Cairns	Wednesday 5 – Friday 7 September
Insurance Ideas Exchange	Collins Square, Melbourne	Tuesday 9 October
Governance Ideas Exchange	Collins Square, Melbourne	Wednesday 24 October
Legal & Compliance Ideas Exchange	Collins Square, Melbourne	Thursday 25 October
Thought Leadership Series – Luncheon	Establishment, Sydney	Thursday 22 November
CEO Forum	AIST offices, Melbourne	Friday 23 November
Thought Leadership Series – Luncheon	The Hotel Windsor, Melbourne	Tuesday 27 November
AIST Awards for Excellence	Metropolis, Melbourne	Wednesday 5 December

For full details visit [aist.asn.au](http://aist.asn.au)

**Australian Institute of Superannuation Trustees**

+61 3 8677 3800  
info@aist.asn.au  
aist.asn.au

 @aistbuzz

 Australian Institute of Superannuation Trustees



AUSTRALIAN INSTITUTE of  
SUPERANNUATION TRUSTEES

SHAPING PROFIT-TO-MEMBER SUPER