



FINANCIAL PLANNING
ASSOCIATION *of* AUSTRALIA

MORNINGSTAR – FUNDAMENTAL PRINCIPLES: HOW TO ALIGN A GOALS BASED INVESTMENT FRAMEWORK TO YOUR ADVICE

(Accred # 010686)

Time	Session	CPD Hours	FPA Professional Dimensions	ASIC Knowledge Requirements	FASEA CPD Areas
8:45am -9:05am	Aligning your clients' goals	0.25	Capability (0.25 hour)	Financial Planning (0.25 hour)	General (0.25 hour)
9:05am -9:45am	Starting with your client: Achieve client goals and valuation driven investing	0.75	Capability (0.75 hour)	Financial Planning (0.75 hour)	General (0.75 hour)
9:45am -10:10am	Bringing a process to life: uncovering global investment opportunities	0.5	Capability (0.5 hour)	Financial Planning (0.5 hour)	Technical Competence (0.5 hour)
10:30am - 11:00am	Keeping emotions from corroding the framework: Rethinking advisers as behavioural coaches	0.5	Attributes and Performance (0.5 hour)	Skill Requirements (0.5 hour)	Client Care and Practice (0.5 hour)



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11:00am - 11:30am	Expect more: What can you expect from Morningstar as your investment solution partner?	0.5	Capability (0.5 hour)	Financial Planning (0.5 hour)	General (0.5 hour)
TOTAL		2.5	Capability (2 hours) Attributes and performance (0.5 hour)	Financial Planning (2 hours) Skill Requirements (0.5 hour)	General (1.5 hours) Technical Competence (0.5 hour) Client Care and Practice (0.5 hour)