

## **Financial Services**

Innovation & Business Skills Australia Ltd

### **Occupation: Sustainability Finance Assistant**

**Job Description:** employees perform basic clerical and customer service roles that focus on sustainable financial investments. (This qualification aims to meet the needs of new entrants wishing to build potential pathways into the Financial Services industry.)

**Qualification:** FNS30104 Certificate III in Financial Services

This qualification reflects the role of individuals who apply a broad range of administrative competencies in varied contexts, using some discretion and judgement but working under close supervision.

The Financial Services FNS04 Training Package guidelines, with the incorporation of an environmental elective have been applied to create this occupational profile:

| <b>13 Units Required</b>       |  |
|--------------------------------|--|
| <b>Core Units</b>              |  |
| FNSICIND301 A                  | Work in the financial services industry                          |
| FNSICGEN301 A                  | Communicate in the workplace                                     |
| FNSICGEN302 A                  | Use technology in the workplace                                  |
| FNSICGEN304 A                  | Apply health and safety practices in the workplace               |
| <b>Elective Units Selected</b> |  |
| FNSICGEN303 A                  | Work with others   |
| FNSICADV301 A                  | Provide general advice on financial products and services        |
| FNSASIC301 A                   | Establish client relationship and analyse needs                  |
| FNSASIC302 A                   | Develop, present and negotiate client solutions                  |
| FNSICCUS301 A                  | Respond to customer enquiries                                    |
| FNSICACC305 A                  | Process payment documentation                                    |
| FNSICORG302 A                  | Prepare reports for management                                   |
| FNSICSAM301 A                  | Identify opportunities for cross selling products and services   |
| BSBSUS301 A                    | Implement and monitor environmentally sustainable work practices |