

FINSIA



# PROFESSIONAL BANKING FUNDAMENTALS

PROFESSIONAL AND RESPONSIBLE  
BANKING IN THE DIGITAL AGE



Chartered Banker

# WHY LEARN WITH FINSIA?

FINSIA - THE PEAK BODY FOR FINANCIAL SERVICE PROFESSIONALS IN AUSTRALASIA - HAS OVER 130 YEARS HERITAGE OF DRIVING HIGH STANDARDS OF PROFESSIONAL CONDUCT AND COMPETENCY.

FINSIA DELIVERS PROFESSIONAL QUALIFICATIONS THAT ARE RECOGNISED AROUND THE WORLD. JOIN THOUSANDS OF BANKERS WHO UNDERSTAND THAT PROFESSIONALISM BENEFITS CUSTOMERS, THE INDUSTRY AND THEIR OWN CAREERS.



## OVERVIEW

THE PROFESSIONAL BANKING FUNDAMENTALS WILL ASSIST YOU TO DEVELOP KNOWLEDGE CRUCIAL FOR WORKING IN BANKING.

If you want to build your career prospects, meaningfully contribute to your organisation's strategy and serve your customers better - then this qualification is for you. Designed in conjunction with local and international experts, the qualification will enhance your understanding of the industry, products and services. Develop the crucial acumen that will enable you to add value in an ethical and professional way.

### IS THIS PROGRAM RIGHT FOR ME?

Do you want to be recognised for the skills you have and obtain industry wide validation for your expertise?

Are you looking for a professional qualification that will reinforce the basics, yet lift your knowledge to meet globally recognised standards?

Are you working in non-banking specialist areas such as HR, IT, Risk and Marketing, but want to specialise in banking?



CUSTOMERS ARE ALIGNING THEMSELVES WITH ORGANISATIONS THEY TRUST AND PBF GIVES YOU THAT. I DRAW ON THE PBF A LOT BECAUSE OF THE STRONG EMPHASIS ON ETHICS AND PROFESSIONALISM."

Paul Vergara, Procurement and Finance Officer, CMA



THE PBF COURSE IS A GREAT QUALIFICATION FOR THOSE EITHER NEW TO THE BANKING AND FINANCE SECTOR, OR FOR PEOPLE LOOKING TO BUILD ON THEIR ACADEMIC QUALIFICATION AND WISHING TO GAIN MORE SPECIFIC BANKING AND FINANCIAL SERVICES KNOWLEDGE."

Maggie Lien, Senior Manager Regulatory Risk, ING

## WHAT WILL I LEARN?

This qualification is broken down into seven chapters, as shown below. You will learn how important banking is to the Australian and New Zealand economies, how to manage risk and how to best serve internal and external customers. Importantly, you will do so with formal ethical training to ensure you do what is "right".

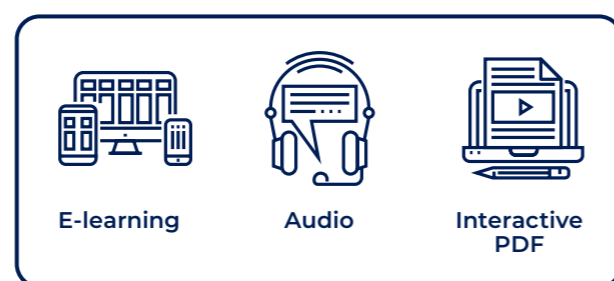
### CHAPTER


<b>01</b>	Explain the purpose, influences and functions of banking in Australia and New Zealand.
<b>02</b>	Explain the importance of high standards of ethical conduct in banking and the practicalities of applying these standards.
<b>03</b>	Explain how key regulatory and legal requirements influence the way in which banks operate.
<b>04</b>	Describe how banking products and services can meet customer needs.
<b>05</b>	Describe how principles of providing high quality service to customers.
<b>06</b>	Understand the key principles of credit and consumer lending and how these are used to provide appropriate outcomes for the customer and the bank.
<b>07</b>	Describe the role of the risk management in banking.


## WHAT DO I GET?


### CHOOSE YOUR LEARNING METHOD


The program suits all learning styles and is delivered in bite-sized units allowing you to study at your own pace. You can choose your learning method or a blend of all three:




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**INTERACTIVE DIGITAL TEXTBOOK**  
Providing core learning materials for each module and case studies to build capability.
- 

**INTERACTIVE STUDY GUIDE**  
The study guide is designed to help you navigate the range of learning resources and includes questions and activities to support your learning and preparation for the module assessment.
- 

**KNOWLEDGE CHECKS**  
Reinforcing key concepts at the end of each unit.
- 

**ASSESSMENT**  
Each module will be assessed by a multiple choice quiz.
- 

**SELF PACED STUDY**  
Start anytime. On average the program is completed within 12 months.

## WHAT WILL A PBF QUALIFICATION MEAN FOR ME?

<b>GLOBAL PORTABILITY</b>	Be recognised with a qualification that is accepted across the globe.
<b>COMPETITIVE ADVANTAGE</b>	Stand out from the crowd by displaying your professional designation 'G FIN' demonstrating your professionalism and commitment to the banking industry and future proofing your career.
<b>GOLD STANDARD</b>	Demonstrate to customers and regulators that you meet the highest standard in banking.
<b>INTERNATIONALLY RECOGNISED</b>	This qualification is globally recognised and has been developed for the Australian and New Zealand markets in partnership with the Chartered Banker Institute and close consultation with senior industry practitioners.

**FOR NEW MEMBERS, A 12-MONTH STUDENT MEMBERSHIP IS INCLUDED IN THE ENROLMENT FEE.**



I'D RECOMMEND TAKING THE PBF TO ANYONE CONSIDERING A FINANCIAL SERVICES CAREER. LEARN ABOUT THE INDUSTRY, ENJOY IT AND SEE WHERE IT TAKES YOU. GRAB IT WITH BOTH HANDS. AS A PROFESSIONAL QUALIFICATION, IT'S COMPREHENSIVE AND MORE PRACTICAL THAN ACADEMIC QUALIFICATIONS."

Alexander Neskovski, Wealth Consultant, Westpac

# THOUSANDS OF EMPLOYEES ARE ON THE PROFESSIONALISM PATHWAY WITH FINSIA THANKS TO THEIR FORWARD-THINKING ORGANISATIONS



## PROFESSIONAL BANKING FUNDAMENTALS

APPLY TODAY

Speak to one of our consultants today [membership@finsia.com](mailto:membership@finsia.com)

Australia: 1300 346 742

New Zealand: 09 887 7337

Visit [finsia.com](http://finsia.com)

“

PBF WAS FRONT OF MIND WORKING IN A SPECIALISED TEAM TO QUICKLY ASSIST OUR COVID-19 IMPACTED CUSTOMERS. THE KNOWLEDGE I HAD GAINED FROM VARIOUS MODULES SUCH AS RISK MANAGEMENT ALONG WITH THE LEGAL AND REGULATORY ENVIRONMENT CHAPTERS HELPED ME TO ADAPT SUCCESSFULLY TO A RAPID CHANGE.”

Samantha O' Donoghue, Customer Relationship Manager, Bendigo Bank

### YOUR PROFESSIONAL QUALIFICATION JOURNEY

If you are ambitious and want deeper skills development in specific functions including Business Banking, Consumer Credit, and Risk look into the benefits of the **Certified Professional Banker**.

Those who want to reach the pinnacle of financial services and the gold standard in banking should consider becoming a **Chartered Banker**.



**FINSIA**  
**135+ YEARS**  
**IN ACTION**

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finsia.com

