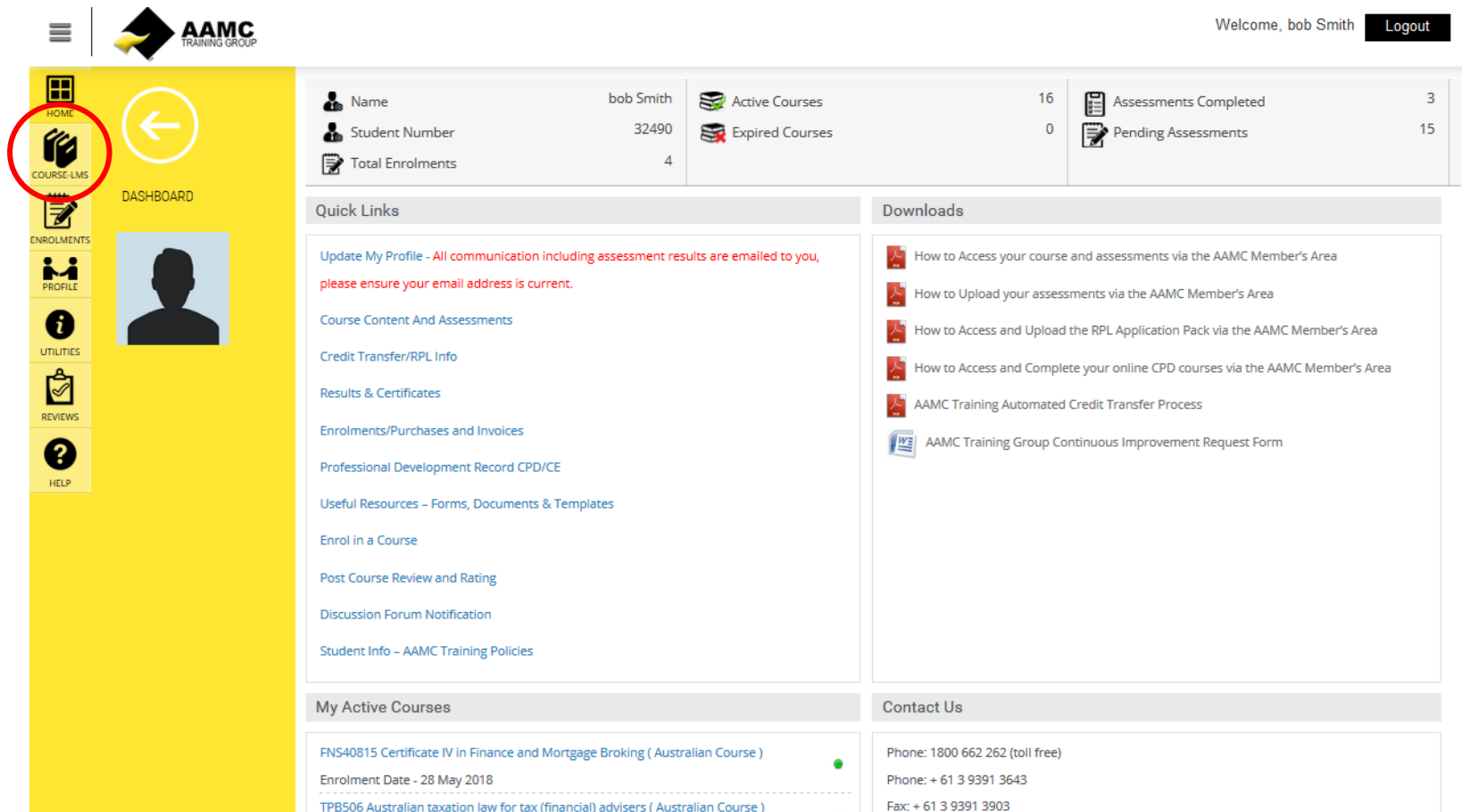


AAMC TRAINING AUTOMATED CREDIT TRANSFER PROCESS

Please follow these instructions to apply for Credit Transfer for any units of competency in your enrolled qualification course.

Step 1 – In your Members Area, select the **Course-LMS** icon in the yellow menu strip on the left hand side.



Welcome, bob Smith [Logout](#)

Name	bob Smith	Active Courses	16	Assessments Completed	3
Student Number	32490	Expired Courses	0	Pending Assessments	15
Total Enrolments	4				

Quick Links

- [Update My Profile - All communication including assessment results are emailed to you, please ensure your email address is current.](#)
- [Course Content And Assessments](#)
- [Credit Transfer/RPL Info](#)
- [Results & Certificates](#)
- [Enrolments/Purchases and Invoices](#)
- [Professional Development Record CPD/CE](#)
- [Useful Resources - Forms, Documents & Templates](#)
- [Enrol in a Course](#)
- [Post Course Review and Rating](#)
- [Discussion Forum Notification](#)
- [Student Info - AAMC Training Policies](#)

Downloads

- [How to Access your course and assessments via the AAMC Member's Area](#)
- [How to Upload your assessments via the AAMC Member's Area](#)
- [How to Access and Upload the RPL Application Pack via the AAMC Member's Area](#)
- [How to Access and Complete your online CPD courses via the AAMC Member's Area](#)
- [AAMC Training Automated Credit Transfer Process](#)
- [AAMC Training Group Continuous Improvement Request Form](#)

My Active Courses

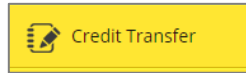
- [FNS40815 Certificate IV in Finance and Mortgage Broking \(Australian Course \)](#)
- [Enrolment Date - 28 May 2018](#)
- [TPB506 Australian taxation law for tax \(financial\) advisers \(Australian Course \)](#)

Contact Us

Phone: 1800 662 262 (toll free)
 Phone: + 61 3 9391 3643
 Fax: + 61 3 9391 3903



Step 2 – You will be directed to a page entitled **Learning Centre**. Select the



tab from the menu on the left.



Learning Centre

[Back to Members Area](#)

- My Progress 0%
- Document / PDF
- Course Introduction
- Course Overview
- Introduction
- IT Help
- Copyright
- Course content
- Model Answers
- Appendices
- Credit Transfer**
- Assessments
- Resources

FNS40815 - Certificate IV in Finance and Mortgage Broking

FNS40815_CertificateIV_FMB_LG_Welcome.pdf 1 / 32

Welcome to AAMC Training Group

"I was able to stand on the shoulders of my teachers and see a world that I couldn't otherwise see"

Joel Klein
New York City Schools Chancellor

Welcome to the AAMC Training Group Certificate IV in Finance and Mortgage Broking learning guide.

Congratulations on your decision to obtain your Certificate IV in Finance and Mortgage Broking. AAMC Training is pleased that you chose to undertake this course with us and we look forward to assisting you in either developing and enhancing your current skills or, guiding you through and inducting you into a much needed and high profile industry.

The teaching material that you have was written and is conducted by AAMC Training. This course is designed for new entrants into Finance and Mortgage Broking who wish to concentrate their efforts on writing finance credit loans.

AAMC Training, after listening to the industry, now provides educational training for those people who operate on either side of the Finance and Mortgage Broking industry. We realised there are Brokers who will never write Plant, Equipment or Vehicle finance loans on one side and on the other side there are Brokers who will never write a Mortgage loan.



STEP 3a – Read the Credit Transfer Details explanation and instructions on how to proceed and which documents are required to qualify for Credit Transfer.



Learning Centre

[Back to Members Area](#)

My Progress 0%

ADD CREDIT TRANSFER DETAILS

Credit Transfer

You may be able to claim credit transfer for a unit/s of competency that you may have previously completed with AAMC Training or another RTO. If you have been awarded a record of result or statement of attainment for any of the units detailed below then please check mark the unit/s you have previously completed and upload a *certified copy of your record of results or statement of attainment. Your credit transfer request will then be reviewed and you will be notified by email if your request has been approved.

*Copies of documents provided in support of an application, or other purpose required by the National Law, must be certified as true copies of the original documents. For a list of persons who can certify documents: <http://www.ahpra.gov.au/Registration/Registration-Process/Certifying-Documents.aspx>

Certified documents must:

- Be initialled on every page by the Authorised Officer.
- Annotated on the last page as appropriate e.g. "I have sighted the original document and certify this to be a true copy of the original" and signed by the Authorised Officer.
- List the name, date of certification, and contact phone number and position number (if relevant) and have the stamp or seal of the Authorised Officer (if relevant) applied.
- If your record of results or statement of attainment was obtained through AAMC Training, an uncertified copy will be sufficient as AAMC Training can confirm the authenticity of your unit/s of competency.

Please refer to AAMC Training's full Recognition Policy for further details.

Course Name FNS40815 - Certificate IV in Finance and Mortgage Broking

Select Units

Unit Code	Unit Name	Credit Transfer Request	Status
FNSFMK505	Comply with financial services legislation and industry codes of practice	<input type="checkbox"/>	

STEP 3b – Scroll down the page to check mark the units already attained previously and select and upload evidence documentation. When complete, select **‘Submit Credit Transfer Request’**.

- Annotated on the last page as appropriate e.g. "I have sighted the original document and certify this to be a true copy of the original" and signed by the Authorised Officer.
- List the name, date of certification, and contact phone number and position number (if relevant) and have the stamp or seal of the Authorised Officer (if relevant) applied.
- If your record of results or statement of attainment was obtained through AAMC Training, an uncertified copy will be sufficient as AAMC Training can confirm the authenticity of your unit/s of competency.

Please refer to AAMC Training's full Recognition Policy for further details.

Course Name FNS40815 - Certificate IV in Finance and Mortgage Broking

Select Units

Unit Code	Unit Name	Credit Transfer Request	Status
FNSFMK505	Comply with financial services legislation and industry codes of practice	<input type="checkbox"/>	
FNSFMB401	Prepare loan application on behalf of finance or mortgage broking clients	<input type="checkbox"/>	
FNSINC401	Apply principles of professional practice to work in the financial services industry	<input type="checkbox"/>	
FNSCRD301	Process applications for credit	<input type="checkbox"/>	
FNSFMB402	Identify client needs for broking services	<input type="checkbox"/>	
FNSFMB403	Present broking options to client	<input type="checkbox"/>	
FNSFMB501	Settle applications and loan arrangements in the finance and mortgage broking industry	<input type="checkbox"/>	
FNSINC402	Develop and maintain in-depth knowledge of products and services used by an organisation or sector	<input type="checkbox"/>	
FNSCUS501	Develop and nurture relationships with clients, other professionals and third party referrers	<input type="checkbox"/>	
BSBWOR501	Manage personal work priorities and professional development	<input type="checkbox"/>	
FNSSAM403	Prospect for new clients	<input type="checkbox"/>	
BSBITU305	Design and produce business documents	<input type="checkbox"/>	

Select RTO

Upload Proof 1 No file chosen

Upload Proof 2 No file chosen

Upload Proof 3 No file chosen

Step 4 – The request will show as ‘**Credit Transfer Request Pending**’ in the table and will be sent to AAMC Training admin to review evidence documentation and approve. Once approved, the assessment will be marked as **Credit Transfer** and will not be required to be completed (unless the unit is part of a clustered assessment and the student requires the other units within the cluster – in which case the full assessment is required to be completed).

Credit Trans Id	Course Name	Date	Status	View File 1	View File 2	View File 3	Additional File
22	FNS40815 - Certificate IV in Finance and Mortgage Broking	29/01/2016	Credit Transfer Request Pending	943_19015_CRICOS Wbinar_Aug2014.pdf			Upload Additional Document

Course Name FNS40815 - Certificate IV in Finance and Mortgage Broking

Select Units

Unit Code	Unit Name	Credit Transfer Request	Status
FNSFMK505	Comply with financial services legislation and industry codes of practice	<input checked="" type="checkbox"/>	Credit Transfer Request Pending
FNSFMB401	Prepare loan application on behalf of finance or mortgage broking clients	<input type="checkbox"/>	
FNSINC401	Apply principles of professional practice to work in the financial services industry	<input checked="" type="checkbox"/>	Credit Transfer Request Pending
FNSCRD301	Process applications for credit	<input checked="" type="checkbox"/>	Credit Transfer Request Pending
FNSFMB402	Identify client needs for broking services	<input type="checkbox"/>	
FNSFMB403	Present broking options to client	<input type="checkbox"/>	
FNSFMB501	Settle applications and loan arrangements in the finance and mortgage broking industry	<input type="checkbox"/>	
FNSINC402	Develop and maintain in-depth knowledge of products and services used by an organisation or sector	<input type="checkbox"/>	



Step 5 – Once the request has been reviewed by AAMC Training Admin, the following example email confirmation will be sent out to the student to advise them of the outcome.

Credit Transfer Approval Email - Message (HTML)

FILE MESSAGE

Ignore Delete Reply Reply All Forward Meeting More

Jan2016 To Manager Done Create New


Rules OneNote Mark Unread Categorize Follow Up Translate Find Related Select Zoom

Mon 01/02/16 10:09 AM

AAMC Information
Credit Transfer Approval Email

To Sandy Thompson

i Follow up. Start by Monday, 1 February 2016. Due by Monday, 1 February 2016.
If there are problems with how this message is displayed, click here to view it in a web browser.



Dear Sandy

This is to inform you that your credit transfer request for units contained in your FNS40815 - Certificate IV in Finance and Mortgage Broking Course has been **approved for the below units.**

FNSFMK505 - Comply with financial services legislation and industry codes of practice

FNSINC401 - Apply principles of professional practice to work in the financial services industry

FNSCRD301 - Process applications for credit

Please feel free to contact us if you require any further assistance.

Kind Regards

