

FP Paraplanning

**Safely build paraplanning capacity
— without compromising compliance.**

Course overview and benefits

This part-time training program upskills experienced Financial Planning Admin VAs to confidently produce legally compliant Statements of Advice (SoAs). It provides structured, section-by-section guidance through the SoA process, focusing on legal obligations, compliance requirements, and SoA modelling.

Trainees build practical capability through hands-on case studies, all reviewed by our coaching team. This allows firms to grow their internal paraplanning capacity sustainably — without the risk of shortcuts or rework.

Course aims and learning outcomes

By the end of this course, trainees will be able to:

- Understand the legal and regulatory framework for SoA preparation.
- Be able to confidently navigate each section of the SoA and apply compliance standards.
- Complete SoA modelling accurately using tools and templates.
- Learn to generate and edit SoAs using real-world case scenarios.
- By the end of the course, they will be capable of producing compliant SoAs independently.



Training Includes

- Legal and compliance obligations related to SoA production.
- Section-by-section compliance walkthrough of the SoA document.
- Strategy fundamentals and modelling guidance.
- Completion of a library of practice SoAs, all reviewed by our coaching team.
- Please note: coaches will vet practice SoAs only. Live SoAs reviews are not part of this training program.

Course delivery method and duration

- The program runs part-time over 5 months, with 2 hours of training per day (approx. 200 hours total).
- Training is self-guided with trainer support, supported by weekly virtual sessions.
- Trainees complete hands-on SoA preparation with guidance from experienced coaches.
- A full library of practice SoAs is included, covering common strategies and structures.

Academy Staff: Complimentary
Non-Academy Staff: \$4,800 + GST

Pay upfront or \$400 + GST per month (12 months)

Pre-requisites

Minimum 12 months industry experience requirement