

Field: Service Sector

Republication of Financial Services (Level 5) New Zealand Qualification

Reviewed qualification

Ref	Version	Qualification Title	Credits
2315	3	New Zealand Certificate in Financial Services (Level 5) with strands in Investment; Life, Disability, and Health Insurance; General Insurance; Residential Property Lending; Personal Lending; Banking; and Trustee Services	40

Review information

Qualification Developer	Ringa Hora Services Workforce Development Council
Reason for the review	Republication to update Strategic Purpose Statement
Review date	July 2024
Outcome date	July 2024
Next review date	31 May 2029

Summary of review and consultation process

This qualification was registered in May 2024 as a result of a review. It was later identified that the strategic purpose statement needed amendment to avoid any misinterpretation that this qualification would be suitable for learners who were *currently providing* regulated financial advice. It is not. Individuals are required to be credentialed before any advice is given.

Main changes resulting from the review process

The Strategic Purpose Statement has been amended from: This qualification is suitable for individuals who *intend on or are currently providing* regulated financial advice to clients or potential clients, to: This qualification is suitable for individuals who ***intend to provide*** regulated financial advice to clients or potential clients.

The qualification was republished with no version change and no change to next review date.

The update will take effect immediately.

Any additional information

It is not intended that anyone be disadvantaged by this republication. However, anyone who feels they have been disadvantaged can appeal to:

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