

SUPER FUNDAMENTALS

COURSE INFORMATION



ABOUT

This course is designed to give you a practical understanding of superannuation, discussing lifestyle goals, strategies to increase your super and the importance of super as a long-term investment throughout your life. This course is a core unit in the Striver Mentor Program.

LEARNING OUTCOMES

The learning goals associated with this unit are:

- To understand the importance of superannuation in your 20s, 30s, 40s, 50s and 60s; and
- To gain an overview of superannuation management strategies and the associated risk and returns at each stage of your working lifetime.

Fundamental concepts discussed include compound interest; different types of super contributions; contribution caps; insurance in super; super consolidation, 'The Super Gap'; estate planning; beneficiary nomination and more.

REAL-WORLD EXAMPLES

Ultimately, this course is designed to increase your awareness of how your personal superannuation can be managed to better your future financial wellbeing - however it also provides insight into the advice that a financial adviser might provide to a client in practice.

Disclaimer: see next page.



ABOUT COLONIAL FIRST STATE

Supporting the Next Generation

Colonial First State has been helping Australians with their superannuation, investment and retirement needs since 1988. Our passion for high performance, service and innovation has made us one of the most consistently awarded fund managers in the country.

We're strong supporters of the financial advice industry and the role it plays in helping people find a better financial future. We've chosen to partner with Striver because we're committed to developing the quality and professionalism of the financial advice industry. Through this partnership, we'll help you to get the best possible start in your financial advice career.