

# **FIN379 Personal Financial Planning**

**Level:** 3

**Credit Units:** 5 Credit Units

**Language:** ENGLISH

**Presentation Pattern:** EVERY JULY

## **Synopsis:**

Financial planning is fundamental towards the formulation and achievement of financial goals. A grounding in the knowledge base for financial planning enables an individual to manage his or her personal finance in the environment of a digital economy in the 21st century. Topics from the knowledge base include asset management, credit management, life insurance, income tax planning, estate planning and the CPF. FIN379 Personal Financial Planning provides a broad perspective around the knowledge base to encompass financial advisory and developments in that space due to FinTech such as robo-advisory.

## **Topics:**

- Financial Planning Process
- Asset and Credit Management
- Risk Management
- Insurance Planning
- Tax Planning
- Estate Planning
- Investment Planning
- Retirement Planning
- Income Tax Planning
- Central Provident Fund
- Professional Ethics and Compliance
- Robo Advisory

## **Textbooks:**

Koh, F. & Fong W. M. (2013): Personal Financial Planning (eText) FT Press  
ISBN-13: 9789813130272

**Learning Outcome:**

- Demonstrate understanding of the financial planning process
- Apply tools and methods in financial planning
- Show an appreciation of the financial advisory profession
- Formulate a financial plan in accordance to given constraints
- Appraise financial planning case studies
- Analyse various risks underlying financial plans

**Assessment Strategies (Evening Class):**

<b>Components</b>	<b>Description</b>	<b>Weightage Allocation (%)</b>
Overall Continuous Assessment	PRE-COURSE QUIZ 1	2
	PRE-CLASS QUIZ 1	2
	PRE-CLASS QUIZ 2	2
	TUTOR-MARKED ASSIGNMENT 1	18
	GROUP BASED ASSIGNMENT 1	20
	PARTICIPATION 1	6
Overall Examinable Components	Written Exam	50
<b>Total</b>		<b>100</b>