

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 (Daytime Class):

Components	Description	Weightage Allocation (%)
Overall Continuous Assessment	PRE-COURSE QUIZ 1	2
	PRE-COURSE QUIZ 2	2
	PRE-COURSE QUIZ 3	2
	TUTOR-MARKED ASSIGNMENT 1	18
	GROUP BASED ASSIGNMENT 1	20
	PARTICIPATION 1	6
Overall Examinable Components	Written Exam	50
Total		100