FINC 7011 INVESTMENT PLANNING

Credit Points 10

Legacy Code 200868

Coordinator Nicole Ibbett (https://directory.westernsydney.edu.au/search/name/Nicole Ibbett/)

Description Investment Planning is one of the core subjects in the Master of Commerce (Financial Planning). The course is designed to provide the educational basis to enable students to increase competence as professional financial advisers and enable them to gain an advanced knowledge and understanding of the financial planning industry. The subject introduces basic concepts of risk and return in relation to investment planning. Various investment vehicles are covered including shares and fixed interest investments.

School Business

Discipline Investment and Securities

Student Contribution Band HECS Band 4 10cp

Check your fees via the Fees (https://www.westernsydney.edu.au/currentstudents/current_students/fees/) page.

Level Postgraduate Coursework Level 7 subject

Equivalent Subjects LGYB 6482 Principles of Investment Planning (PG)

Restrictions

Students must be enrolled in 2671/2770 Master of Commerce (Financial Planning) or 2690 Graduate Certificate in Commerce (Financial Planning).

Learning Outcomes

On successful completion of this subject, students should be able to:

1. Outline the reasons for investing, examine the different asset classes, various types of risk, and the purpose of diversification;
2. Explain the workings of the main investment markets;
3. Apply the techniques of the modern portfolio theory and investment analysis to finding solutions to various investment problems.

Subject Content

- macroeconomic matters
- systems and linkages
- financial products
- how to choose An appropriate structure to meet The needs of A client
- regulation
- Explaining The advice process in A manner that The client understands
- research and research methodologies
- Behavioural economics
- life cycle portfolio construction
- Product feature and selection
- debt management
- property Issues and direct equities

Assessment

The following table summarises the standard assessment tasks for this subject. Please note this is a guide only. Assessment tasks are regularly updated, where there is a difference your Learning Guide takes precedence.

Type	Length	Percent	Threshold	Individual/ Group Task
Report	1,000 words	20	N	Individual
Presentation	15 minutes	20	N	Individual
Final Exam	2 hours	60	Y	Individual

Prescribed Texts

- Taylor, S 2020, Financial planning in Australia: Advice and Wealth Management, 9th edn, LexisNexis Butterworths, Chatswood, NSW

Teaching Periods

Quarter 3 (2024)

Online

Online

Subject Contact Nicole Ibbett (https://directory.westernsydney.edu.au/search/name/Nicole Ibbett/)

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC7011_24-Q3_ON_2#subjects)