FINC 7011 INVESTMENT PLANNING

Credit Points 10

Legacy Code 200868

Coordinator Amanda Craft (https://directory.westernsydney.edu.au/search/name/Amanda Craft/)

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

1. Investment markets
2. Risk, return and diversification
3. Direct investing and the personal investor
4. Indirect investing and the personal investor
5. Alternative investments and the personal investor
6. Behavioural finance and investment objectives for personal investors
7. Risk tolerance and asset allocation within a personal portfolio
8. Ongoing portfolio management
9.

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	Mandatory
Report	1,000 words	30	N	Individual	N
Presentatio	15 minutes	20	N	Individual	N
Final Exam	2 hours	50	Y	Individual	Y

Prescribed Texts

- Taylor, S, Financial planning in Australia: Advice and Wealth Management, LexisNexis Butterworths, Chatswood, NSW (current edition).

Teaching Periods

Quarter 3 (2025)

Online

Online

Subject Contact Amanda Craft (https://directory.westernsydney.edu.au/search/name/Amanda Craft/)

View timetable (https://classregistration.westernsydney.edu.au/odd/timetable/?subject_code=FINC7011_25-Q3_ON_2#subjects)