
# WEALTH MANAGEMENT

*'Informative, and not as technical as other finance courses, should be taken if unsure about what specific finance industry to study'*

FINS2643

A second level finance subject that delves into the investment and financial issues arising from personal wealth management activities. This course examines deeply into how to set financial plans, portfolio management, investment strategies, insurance, superannuation, tax and estate planning. It allows the students to understand how to make decisions for superannuation specifically as a trustee as well as looking into the regulatory framework.

Prerequisites: FINS2624

Structure of the course:

Semester 1:

30% Tutorial Participation (15% weekly Moodle blog post, 10% presentation, 5% tutorial discussion)

25% Mid-semester exam

45% Final Exam during Exam Period

Semester 2:

30% Tutorial Participation (15% weekly Moodle blog post, 10% presentation, 5% tutorial discussion)

30% Mid-semester exam

40% Final Exam during Exam Period

* Disclaimer: Semester 2 Assessment details may be subject to change

## STUDENT REVIEW

*"Lots of group work, quite theory based and in my opinion quite easy"*

*"Don't really need the textbook as lecture slides are quite in depth and should be sufficient"*

*"Relevant to the financial planning industry, if that's what you are interested in"*

*"Not a lot of mathematics, more theoretical"*

## WHEN IS IT OFFERED

1

2

Lecture:
Wednesday 12-2pm, 4-6pm

Tutorial:
Monday and Wednesday