3639

ESTATE PLAN & ASSET PROTECTION

FINS3639

A subject that builds upon the core courses of Portfolio Management and Wealth Management that provides insight into the fundamental issues related to asset protection and succession planning. A practical subject that covers all the key estate planning elements impacting clients in need from a financial planning angle. Allows students to have a real insight into the world through a practical case study element and identifying the key issues faced by clients.

Prerequisites: FINS2624, FINS2643

Structure of the course:

Semester 1:

40% Individual Case Study Assignment

60% Final Exam in Exam Period

Semester 2:

N/A

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

STUDENT REVIEW

"Really challenging course that allows students to have a real insight due to the case study"

WHEN IS IT OFFERED

1

2 Not Offered in Semester 2