

## In Progress

Please note that this Unit Profile is still in progress. The content below is subject to change.



# FINC11001 *Fundamentals of Personal Financial Planning*

## Term 2 - 2023

Profile information current as at 26/03/2023 09:41 pm

All details in this unit profile for FINC11001 have been officially approved by CQUniversity and represent a learning partnership between the University and you (our student). The information will not be changed unless absolutely necessary and any change will be clearly indicated by an approved correction included in the profile.

## General Information

### Overview

This unit is the foundation unit for students completing the Financial Planning stream and covers the professional financial planning process, including the Australian legal framework and the responsibilities of financial planners. You will learn how to investigate a client's financial situation and turn the core elements of financial planning into a strategic financial plan. You will also be introduced to financial planning software, tools and templates used in real-world financial planning practice as well as communication methods aimed at building long term client relationships.

### Details

Career Level: *Undergraduate*

Unit Level: *Level 1*

Credit Points: 6

Student Contribution Band: 10

Fraction of Full-Time Student Load: 0.125

### Pre-requisites or Co-requisites

There are no requisites for this unit.

Important note: Students enrolled in a subsequent unit who failed their pre-requisite unit, should drop the subsequent unit before the census date or within 10 working days of Fail grade notification. Students who do not drop the unit in this timeframe cannot later drop the unit without academic and financial liability. See details in the [Assessment Policy and Procedure \(Higher Education Coursework\)](#).

### Offerings For Term 2 - 2023

- Online

### Attendance Requirements

All on-campus students are expected to attend scheduled classes - in some units, these classes are identified as a mandatory (pass/fail) component and attendance is compulsory. International students, on a student visa, must maintain a full time study load and meet both attendance and academic progress requirements in each study period (satisfactory attendance for International students is defined as maintaining at least an 80% attendance record).

### Website

[This unit has a website, within the Moodle system, which is available two weeks before the start of term. It is important that you visit your Moodle site throughout the term. Please visit Moodle for more information.](#)

## Class and Assessment Overview

Information for Class and Assessment Overview has not been released yet.

This information will be available on Monday 15 May 2023

## CQUniversity Policies

All University policies are available on the [CQUniversity Policy site](#).

You may wish to view these policies:

- Grades and Results Policy
- Assessment Policy and Procedure (Higher Education Coursework)
- Review of Grade Procedure
- Student Academic Integrity Policy and Procedure
- Monitoring Academic Progress (MAP) Policy and Procedure – Domestic Students
- Monitoring Academic Progress (MAP) Policy and Procedure – International Students
- Student Refund and Credit Balance Policy and Procedure
- Student Feedback – Compliments and Complaints Policy and Procedure
- Information and Communications Technology Acceptable Use Policy and Procedure

This list is not an exhaustive list of all University policies. The full list of University policies are available on the [CQUniversity Policy site](#).

## Previous Student Feedback

### Feedback, Recommendations and Responses

Every unit is reviewed for enhancement each year. At the most recent review, the following staff and student feedback items were identified and recommendations were made.

#### Feedback from Student evaluation

##### **Feedback**

Some students found the work integrated learning partially completed Assessment 2 - Statement of Advice (financial plan) assessment template too daunting and one student wanted the template to only include the sections that are required to be filled out.

##### **Recommendation**

The request to simplify the assessment by only including sections that the student needs to fill is no longer simulating a simplistic version of the real world or preparing students for the real world of financial advice. However, to further support students cope with the assessment, the unit coordinator will make additional recordings focussing on each section of the Assessment template in more detail.

#### Feedback from Student evaluation

##### **Feedback**

Some guidelines on how to correctly cite and reference through this specific assignment would have been helpful.

##### **Recommendation**

Although the orientation video points out where students are to find resources for their assessments, like the correct citation and referencing style, the unit coordinator will try and improve the design of the Moodle site to make it clear where the resources are to be found.

#### Feedback from Student evaluation

##### **Feedback**

Content needs to be revised and updated where possible as the students find it leads to unnecessary workloads and confusion

##### **Recommendation**

Unit coordinator will revise the content by removing the textbook resource and replace with Study Guides and Overhead slides that can serve as learning resources.

#### Feedback from Student evaluation

##### **Feedback**

Students want a lecture video as well that goes for 30 to 40 minutes.

##### **Recommendation**

Unit coordinator will revise how the content is delivered via a video.

## Unit Learning Outcomes

Information for Unit Learning Outcomes has not been released yet.

This information will be available on Monday 15 May 2023

## Alignment of Learning Outcomes, Assessment and Graduate Attributes

Information for Alignment of Learning Outcomes, Assessment and Graduate Attributes has not been released yet.

This information will be available on Monday 15 May 2023

## Textbooks and Resources

Information for Textbooks and Resources has not been released yet.

This information will be available on Monday 15 May 2023

## Academic Integrity Statement

Information for Academic Integrity Statement has not been released yet.

This unit profile has not yet been finalised.