FINC11001 *Fundamentals of Personal Financial Planning*
Term 1 - 2025

Profile information current as at 21/11/2024 11:42 pm

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 1 - 2025
* 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 13 January 2025

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 evaluations

Feedback
If submitting an assessment in two parts, it would be more effective to separate them into individual documents rather than combining them into a single file.

Recommendation
Will implement this recommendation for 2025 and beyond.

Feedback from Student evaluations

Feedback
Have optional workshops for people new to financial planning

Recommendation
Unit coordinator to continue to offer pre-arranged one-on-one Zoom sessions for those new to financial planning, which is more productive than having set consultation times, when nobody may turn up.

Feedback from Student evaluations

Feedback
Navigating and finding content on Moodle was considered difficult and confusing. To quote the student: .."it felt like it was a bit of this here and bit of that there and so on.."

Recommendation
Returning to a prescribed textbooks might solve the problem of student struggling to find information given there is an index, and eBooks have good search functions.

Feedback from Self-reflection

Feedback
Some students are dissatisfied with the unit coordinator developed content that comes from several different references and sources

Recommendation
Returning to textbooks will give students more content structure, and detail in one resource, rather than expecting them to access several different resources or sources of knowledge and information to learn from.

Unit Learning Outcomes

Information for Unit Learning Outcomes has not been released yet.
This information will be available on Monday 13 January 2025

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 13 January 2025

Textbooks and Resources

Information for Textbooks and Resources has not been released yet.
This information will be available on Monday 17 February 2025

Academic Integrity Statement

Information for Academic Integrity Statement has not been released yet.
This unit profile has not yet been finalised.