

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 1 - 2027

Profile information current as at 07/09/2026 08:59 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 1 - 2027

- 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 11 January 2027

## 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
- Academic Progression Policy and Procedure
- Student Refund and Credit Balance Policy and Procedure
- 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 SUTE

##### Feedback

Student workload - Students appear to be experiencing a mismatch between the expected workload and the perceived demands of the unit compared to other core units. While financial planning is inherently complex and the Statement of Advice (SOA) process is time-intensive, students are signalling that they struggle to differentiate between essential and supplementary materials.

##### Recommendation

Review the Moodle structure and only include "essential weekly learning materials". Consider reducing duplication across learning resources and assessment guidance.

#### Feedback from SUTE

##### Feedback

Clarity of assessment expectations - Students requested greater clarity regarding assessment expectations, particularly for the SOA assignment. Additional assessment support resources, including exemplars, FAQs, and assessment walkthroughs, will be developed to enhance transparency and improve student confidence.

##### Recommendation

Develop a marking guide walkthrough video for each major assessment. Review communication approaches during workshops to ensure guidance is supportive and developmental.

#### Feedback from SUTE

##### Feedback

Novice learner support - Several students indicated difficulty transitioning into professional financial planning concepts, particularly the Statement of Advice, due to limited prior exposure to the industry. Additional introductory resources and early-semester scaffolding will be incorporated to better support students who are new to financial planning.

##### Recommendation

Introduce an early "Introduction to Financial Planning Practice" module.

#### Feedback from SUTE

##### Feedback

Unit organisation - Students reported difficulties managing the large assessment template during collaborative work. Assessment documents will be reviewed to improve usability and minimise technical barriers to successful completion.

##### Recommendation

Separate Part A and Part B into different template documents. Reduce file size where possible by removing unnecessary formatting or embedded content.

#### Feedback from SUTE

##### Feedback

Workshops go over time sometimes

##### Recommendation

Audit workshop content to ensure delivery remains within the scheduled timeframe.

#### Feedback from SUTE

##### Feedback

Currency and relevancy of learning resources - Students requested clearer identification of updated learning materials and more contemporary lecture content. Resource currency and communication regarding annual updates will be enhanced in future offerings.

##### Recommendation

Record a short introduction each term outlining current updates. Include "Updated for 2026" labels on revised resources. Create a "What's New This Term?" announcement page. Gradually refresh older video content.

## Unit Learning Outcomes

Information for Unit Learning Outcomes has not been released yet.  
This information will be available on Monday 11 January 2027

## 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 11 January 2027

## Textbooks and Resources

Information for Textbooks and Resources has not been released yet.  
This information will be available on Monday 15 February 2027

## Academic Integrity Statement

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