



FIN4113 – PERSONAL FINANCE AND PRIVATE WEALTH MANAGEMENT (SEM 2 2017/2018)

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Consultation: E-mail at least the day before

Textbooks: Benedict KOH and Wai Mun FONG (2017), “Personal Financial Planning”, 5th edition, Pearson-Prentice Hall.
Benedict KOH and Wai Mun FONG (2017), “Personal Investments”, 2nd edition, Pearson-Prentice Hall.

Target Audience

The course is primarily intended for individuals who wish to improve their money management skills. It is also suitable for those who aspire to be independent financial advisors or a career in private wealth management.

Course Objectives

Sound knowledge of personal financial planning is an important life skill. Wealth accumulation and protection is also a valued financial goal of many individuals and families. This course aims to equip individuals with skills to manage their personal finances and private wealth. As the course covers many current topics in wealth management, it will also benefit students aspiring to enter the financial planning and wealth management industry.

The course is divided into two parts. Part I focuses on the basic building blocks of personal financial management. Topics include key steps in financial planning, financial planning tools, credit management, liquid asset management and insurance.

Part 2 of the courses focuses on wealth management and asset protection. Topics include behavioral finance and personal investing, strategic asset allocation, passive and active investing, mutual funds and the hunt for alphas.

Assessment: This is a 100% CA course

Term Test	30%
Term Project	30%
Assignments	25%
Class Participation	15%
Total	100%

Points to Note:

1. Financial calculators may be needed in the course.
2. **Attendance:** Students must not miss more than 2 classes (not including absence due to medical (accompanied by medical certificates) or compassionate reasons). **Violators will be heavily penalized or may even fail the entire module.**
3. CA Attendance: Students who miss any CA component will receive zero marks for that particular component. Absentees due to medical (accompanied by medical certificates) or compassionate reasons may be given a substitute form of assessment.
4. Students are encouraged to always feedback to the instructor comments and suggestions that may help the class to learn better.
5. Students are to check the IVLE weekly for announcements.
6. Forum in IVLE exclusively for students' discussions
7. Please use NUS e-mail for e-mail communications

SPECIAL NOTE FROM THE BBA OFFICE: ACADEMIC HONESTY & PLAGIARISM

Academic integrity and honesty is essential for the pursuit and acquisition of knowledge. The University and School expect every student to uphold academic integrity & honesty at all times. Academic dishonesty is any misrepresentation with the intent to deceive, or failure to acknowledge the source, or falsification of information, or inaccuracy of statements, or cheating at examinations/tests, or inappropriate use of resources.

Plagiarism is 'the practice of taking someone else's work or ideas and passing them off as one's own' (The New Oxford Dictionary of English). The University and School will not condone plagiarism. Students should adopt this rule - You have the obligation to make clear to the assessor which is your own work, and which is the work of others. Otherwise, your assessor is entitled to assume that everything being presented for assessment is being presented as entirely your own work. This is a minimum standard. **In case of any doubts, you should consult your instructor.**

Additional guidance is available at:

<http://www.nus.edu.sg/registrar/adminpolicy/acceptance.html#NUSCodeofStudentConduct>

Online Module on Plagiarism:

<http://emodule.nus.edu.sg/ac/>