FINC 2002 PERSONAL ASSET MANAGEMENT

Credit Points 10

Legacy Code 200265

Coordinator Amanda Craft (https://directory.westernsydney.edu.au/search/name/Amanda Craft/)

Description This subject provides students with necessary knowledge and skills to construct and manage a portfolio of personal assets. Emphasis is placed on how the individual, rather than the firm, approaches financing and investing decisions. The subject will consider the theories of portfolio construction, concepts of investment risk, return and diversification, matching asset allocation based on client's individual risk profile, design and management of a personal investment portfolio and the law as it relates to investments. This subject meets accreditation requirements of the Financial Adviser Standards and Ethics Authority (FASEA).

School Business

Discipline Investment and Securities

Student Contribution Band HECS Band 4 10cp

Check your HECS Band contribution amount via the Fees (https://www.westernsydney.edu.au/currentstudents/current_students/fees/) page.

Level Undergraduate Level 2 subject

Pre-requisite(s) FINC 3006

Incompatible Subjects -

Learning Outcomes

On successful completion of this subject, students should be able to:

1. Explain concepts in personal asset management including assets, risks, asset allocation.
2. Determine taxation and legal implications of different forms of financing and investment
3. Build an asset portfolio using principles of portfolio management for self or client
4. Communicate concepts and decisions in managing personal assets to diverse stakeholders in a range of formats

Subject Content

- The role and scope of investments
- Investment risk, return and diversification
- Modern portfolio and behavioural finance concepts
- Portfolio design including asset allocation and risk profiling
- Asset Classes – Equity, Cash and Fixed Interest, Property, Internationals, Exotics
- Direct Investment
- Indirect Investment
- Taxation Planning and Investments
- Law of Investments
- Portfolio management

Assessment

The following table summarises the standard assessment tasks for this subject. Please note this is a guide only. Assessment tasks are regularly updated, where there is a difference your Learning Guide takes precedence.

Item	Length	Percent	Threshold	Individual/ Group Task
Portfolio	1500 words	20	N	Individual
Case Study	2000 words	40	N	Individual
Final Exam	2 hours	40	Y	Individual

Prescribed Texts

- Gitman, L, Joehnk, M, Smart, S, Juchau, R, Ross, D & Wright, S 2011, Fundamentals of investing, 3rd edn, Pearson Australia.

Teaching Periods

Autumn

Parramatta City - Macquarie St

Day

Subject Contact Amanda Craft (https://directory.westernsydney.edu.au/search/name/Amanda Craft/)

View timetable (https://classregistration.westernsydney.edu.au/even/timetable/?subject_code=FINC2002_22-AUT_PC_D#subjects)