

# **FIN371e Retirement Planning**

**Level:** 3

**Credit Units:** 5 Credit Units

**Language:** ENGLISH

**Presentation Pattern:** EVERY JULY

**E-Learning:** BLENDED - Learning is done MAINLY online using interactive study materials in Canvas. Students receive guidance and support from online instructors via discussion forums and emails. This is supplemented with SOME face-to-face sessions. If the course has an exam component, this will be administered on-campus.

## **Synopsis:**

A financial planner needs to be informed of the basics of retirement planning for clients. Providing for retirement is very important in ageing societies with no social security system. Individuals have to plan carefully to provide for their retirement. Consideration of various investment alternatives for retirement and an understanding of the Central Provident Fund will form the major part of this course.

## **Topics:**

- Importance of retirement planning
- Understanding CPF schemes
- Risk management in retirement planning
- Investment planning for retirement
- The mechanics of the retirement planning process
- Role of financial planner in retirement counseling

## **Textbooks:**

: FIN371 M5 Retirement Planning  
ISBN-13: e- 9789810749118-AA

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**Learning Outcome:**

- Demonstrate the importance of retirement planning
- Design appropriate retirement planning process
- Appraise the role of CPF contributions towards retirement
- Apply portfolio analysis for retirement planning
- Implement retirement planning programs for clients
- Develop strategies to manage retirement portfolios
- Demonstrate the essential knowledge and interpersonal skills to work effectively in a team
- Demonstrate proficiency in writing

**Assessment Strategies:**

<b>Continuous Assessment Component</b>	<b>Weightage (%)</b>
PRE-COURSE QUIZ	2
PRE-CLASS QUIZ	2
PRE-CLASS QUIZ	2
GROUP BASED ASSIGNMENT	38
PARTICIPATION	6
<b>Sub-Total</b>	<b>50</b>

<b>Examinable Component</b>	<b>Weightage (%)</b>
Written Exam	50
<b>Sub-Total</b>	<b>50</b>

**Weightage Total** **100**