

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:

: M5 Retirement Planning
ISBN-13: 9789810749118-AA

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ISBN-13: 9789810749118

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

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

Examinable Component	Weightage (%)
Written Exam	50
Sub-Total	50

Weightage Total **100**