

In Progress

Please note that this Unit Profile is still in progress. The content below is subject to change.



FINC13001 *Estate Planning*

Term 2 - 2027

Profile information current as at 09/09/2026 05:05 am

All details in this unit profile for FINC13001 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 covers the role of the financial advisor in estate and succession planning. You will examine the legal and taxation issues related to estate and succession planning. You will apply the skills required for managing the client relationship and construct an estate and succession plan for a client situation. In this unit you will have the opportunity to integrate the broad range of knowledge and skills required of a practicing Financial Planner into a practice focused project based on a practical client situation.

Details

Career Level: *Undergraduate*

Unit Level: *Level 3*

Credit Points: 6

Student Contribution Band: 10

Fraction of Full-Time Student Load: 0.125

Pre-requisites or Co-requisites

Pre-requisites: FINC19016 Retirement and Superannuation and FINC19019 Insurance Planning

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 2 - 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 17 May 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

This term experienced some challenges with Moodle functionality, course content organization, and unavoidable disruptions.

Recommendation

Ensure contingency plans for technical and organizational issues, such as backup internet options and pre-scheduled content releases. Regular communication about any disruptions should continue to maintain transparency and student trust.

Feedback from SUTE

Feedback

Course content was well-balanced between video and reading materials, and Zoom workshops were highly valued for incorporating real-world experiences.

Recommendation

Continue using interactive teaching methods and real-world case studies. Preserve the high level of responsiveness through timely feedback and accessible communication channels.

Unit Learning Outcomes

Information for Unit Learning Outcomes has not been released yet.
This information will be available on Monday 17 May 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 17 May 2027

Textbooks and Resources

Information for Textbooks and Resources has not been released yet.
This information will be available on Monday 21 June 2027

Academic Integrity Statement

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