

In Progress

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



FINC19020 *Financial Plan Construction*

Term 2 - 2025

Profile information current as at 22/11/2024 08:52 pm

All details in this unit profile for FINC19020 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 capstone unit applies prior knowledge to produce a statement of advice for a real world case study. You will conduct an initial client interview, research and develop a wealth strategy and learn to present a financial plan to a client. You also gain insights into management of client relationships.

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 - FINC11001 and FINC19011 and LAWS19033 Co-requisites:- FINC19012 and FINC19016 and FINC13001

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 - 2025

- 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 19 May 2025

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
- Monitoring Academic Progress (MAP) Policy and Procedure – Domestic Students
- Monitoring Academic Progress (MAP) Policy and Procedure – International Students
- Student Refund and Credit Balance Policy and Procedure
- Student Feedback – Compliments and 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 Student evaluation

Feedback

Students want one word document with the assessment instructions

Recommendation

The unit coordinator will review the assessment instruction document.

Feedback from Student evaluation

Feedback

Students appreciated the knowledge and experience shared by the guest lecturers

Recommendation

Will continue to incorporate guest lecturers into the live weekly Zoom workshops

Feedback from Student evaluation

Feedback

Students preferred the unit coordinator generated case study fact find as it is more realistic than the AMP University Challenge fact find information.

Recommendation

The unit coordinators will review whether the AMP University Challenge case study is appropriate going forwards

Unit Learning Outcomes

Information for Unit Learning Outcomes has not been released yet.

This information will be available on Monday 19 May 2025

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 19 May 2025

Textbooks and Resources

Information for Textbooks and Resources has not been released yet.

This information will be available on Monday 23 June 2025

Academic Integrity Statement

Information for Academic Integrity Statement has not been released yet.

This unit profile has not yet been finalised.