Master of Applied Finance and Wealth Management (MFWM)

CRICOS Provider Code: 03335G | CRICOS Course (MFWM) 117154K

Unit Learning Outcomes (ULOs)

1) Financial Accounting and Financial Statement Analysis (MFWM ACC 101)
   - Identify key accounting concepts and theories.
   - Construct financial and cash flow statements.
   - Utilise key financial indicators and analytical tools essential for assessing a company's long-term solvency and sustainability.
   - Analyse a company's financial health related to its profitability, short-term liquidity, and operational efficiency.

2) Foundations of Wealth Management (MFWM WMG 101)
   - Analyse the regional and global wealth management landscape
   - Recognise the relevance of life cycle financial planning and the distinction between financial planning and wealth management
   - Explain the various fundamental concepts of financial planning and wealth management
   - Evaluate the major categories of financial products and their fit to clients' financial goals and stage of life cycle
   - Investigate the requirements of ethical conduct for wealth managers/financial planners

3) Quantitative Techniques (MFWM QTT 101)
   - Explore the various quantitative techniques used to describe, evaluate visualize relevant data
   - Conduct quantitative techniques to describe financial data and test claims of performance
   - Assess and quantify risk according to current best practice in the markets
   - Apply optimization techniques to assess financial assets and construct efficient portfolios

4) Macroeconomics and Central Bank Policy (MFWM ECO 101)
   - Examine the various elements and functions of an economy.
   - Assess the importance of financial systems and their varying structures and governance within various global economies.
   - Evaluate the monetary transmission mechanisms and their implications on economies.
   - Illustrate how central banks influence interest rates, the exchange rate, and the flow of currency.

5) Principles of Financial Management (MFWM FIN 101)
   - Develop a thorough understanding of the elements and principles of time value of money.
   - Demonstrate the key concepts, techniques and tools involved in financial decision-making process.
   - Examine the various asset classes and their valuation models.
   - Analyse the concepts of risk, return, market efficiencies and portfolio diversification.
   - Assess and apply appropriate financial management tools and techniques in investment decision making.

6) Behavioural Finance and Financial Psychology (MFWM FIN 102)

- Compare and contrast traditional and behavioural based personal financial decision-making models.
- Recognise the influence of emotions, biases, and psychological traits on personal financial decisions.
- Appraise the impact of culture and other social forces on investment decisions.
- Assess the effects of behavioural decision making on financial markets.
- Examine the potential impact of machine learning and artificial intelligence on financial decision making.

7) Global Financial Markets (MFWM FIN 203)

- Explore the fundamental structure and objectives inherent in global financial markets.
- Critically reflect on the challenges and opportunities that emerge from the integration of global financial markets, encompassing aspects such as currency wars and financial crises.
- Examine international currencies and foreign exchange markets.
- Analyze the regulations and recent developments in global financial markets and their implications for countries, firms and investment opportunities.

8) Client Communication and Relationship Management (MFWM MKT 201)

- Identify ways to establish communication with clients with nonverbal, verbal and listening skills.
- Analyse client objectives, needs, financial situation, and risk profile and develop appropriate strategies and solutions.
- Estimate the impacts of quality indicators and their delivery to sustain and grow customer relationships both locally and globally.
- Recommend long range and integrated customer strategies pertaining to customer acquisition, retention and growth.

9) Fundamental and Technical Analysis (MFWM FIN 204)

- Evaluate the concepts, frameworks and techniques of fundamental and technical analysis.
- Apply various fundamental and technical analysis techniques in the context of global equity markets.
- Create investment portfolios applying the different investment trading types through intrinsic and charting techniques.

10) Derivatives (MFWM FIN 205)

- Examine derivative markets and various financial instruments, their features and use.
- Interpret the pricing principles and methods of valuing derivatives.
- Recognise the importance of derivatives products and their role in wealth management.
- Apply appropriate derivative tools, techniques and strategies for hedging, arbitrage and trading.

11a) Ethics, Professional Standards and Regulations in Wealth Management (MFWM WMG 202)

- Identify ethical frameworks, conflicts and dilemmas and the role and importance of ethics in the wealth management and financial services industries.

- Recognise the professional standards, regulatory requirements and code of conduct within wealth management and the financial services industry.
- Debate the policies and governance processes established in firms to instil ethics and professional standards.
- Simulate ethics, professional standards and regulations in real-world situations.

11b) Ethical business practices and contemporary business law in Australia (MFWM LAW 201)

- Compare the basic concepts of business law and ethical norms relating to Australian business and finance.
- Apply the fundamental principles of FAS and its Code of Ethics when addressing the financial needs of clients.
- Evaluate the challenges and potential conflicts of interest faced by the financial planning industry.
- Construct a limited scope Statement of Advice for postretirement according to FAS' recommendations.

12a) Insurance Planning and Risk Management (MFWM WMG 203)

- Examine the role of the financial planner in the personal risk assessment process.
- Critique the various personal insurance products and their features, mechanics and role in risk management.
- Analyse individual risk areas and the extent and type of protection best suited for the clients' financial situation and financial goals.
- Develop a comprehensive risk assessment and insurance plan for a potential client.

12b) Regulation of Financial Planning Development in Australia (MFWM WMG 204)

- Apply the basic concepts of client financial planning.
- Present and defend ethical client financial planning recommendations.
- Construct a compliant comprehensive State of Advice (SOA) via a popular financial planning software program.
- Outline the legal, social, and ethical responsibilities of financial planners relating to contemporary financial planning issues faced by the client and create SOA strategic solutions.

13) Applied Research Project (MFWM PRO 201)

- Assess relevant wealth management challenges and opportunities to formulate a research project.
- Identify suitable frameworks, quantitative techniques and research approaches through systematic review of practice and the academic literature.
- Apply quantitative and research skills to investigate complex business challenges from the viewpoint of stakeholders.
- Draw key inferences from the research and present the findings demonstrating a high degree of personal autonomy, accountability and professional judgement.

14)Portfolio Management and Asset Allocation Strategies (MFWM FIN 306)

- Evaluate portfolio management concepts, theories and strategies.
- Translate capital market expectations into strategic asset allocation.

- Formulate investment policy statements for various investor (individual and institutional) profiles and in line with regional regulatory guidelines.
- Employ various equity and portfolio management techniques for tactical and strategic decision making.

15)Fintech Innovation, Crypto Assets and Robo Advisory (MFWM FTC 301)

- Recognise the evolution of FinTech, its ecosystem & sub-domains.
- Assess various FinTech and WealthTech business models.
- Examine models and technologies for delivering personalised wealth management and Robo-Advisory services.
- Identify the fundamentals underlying Blockchain and other decentralised distributed ledger technologies.
- Explore the realm of crypto assets, cryptocurrency fundraising, and diverse disruptive business models.

16)Structured Financial Instruments (MFWM FIN 307)

- Evaluate the different types of structured financial instruments and their features
- Choose appropriate structured financial instruments to meet the needs and risk tolerance levels of investors
- Design innovative structured products for investors combining features of traditional asset classes
- Appraise the value of structured financial instruments in various local and global markets

17) Alternative Investments (MFWM FIN 308)

- Identify the various categories of alternative investments.
- Discuss risk management strategies and framework pertaining to alternative investments.
- Assess the risks, benefits and appropriateness of various alternative investments in structuring an investment portfolio.
- Apply appropriate valuation frameworks for different asset classes of alternative investments.

18a) Indian Personal Taxation (MFWM WMG 305)

- Explain the personal tax framework in India.
- Analyse the implication of tax on income received from various sources.
- Contrast the tax treatment of different investments and their respective tax advantages.
- Prepare detailed income tax returns in compliance with relevant tax regulations and requirements.

18b) Islamic Finance and Investing (MFWM FIN 309)

- Explore the basic concepts of Islamic banking and finance applied locally and globally.
- Evaluate the fundamental principles of Islamic and Shariah-compliant financial instruments.
- Differentiate between the various Islamic finance instruments and conventional financial instruments.

- Outline the challenges faced by the Islamic finance industry.

18c) Financial Planning and Taxation in Australia **(**MFWM WMG 306)

- Identify legal concepts relevant to financial planning.
- Recognise the tax implications of asset sales.
- Evaluate superannuation as a tax-preferred investment strategy.
- Formulate estate planning strategies.

19a) Retirement and Estate Planning (MFWM WMG 3075)

- Appraise alternative asset classes for estate planning.
- Evaluate the various retirement planning products and their structures available.
- Design tax-effective retirement planning products.
- Select appropriate retirement and estate planning strategies based on different clients' scenarios.

19b) Retirement and Estate Planning in India (MFWM WMG 308)

- Illustrate retirement and estate planning principles, tools, strategies and processes
- Classify the various retirement planning products, offerings and regulatory pension provisions in India
- Design tax-effective retirement planning products
- Recommend appropriate retirement planning strategies based on client financial situation, needs and goals

19c) Superannuation and Financial Planning in Australia (MFWM WMG 309)

- Demonstrate the net benefits of superannuation as an asset class.
- Evaluate the role of superannuation in a financial planning context.
- Investigate superannuation fees and charges and the net returns derived from this investment.
- Compare the performance of alternative superannuation funds.

20) Capstone Industry Project (MWM CPP 301)

- Develop an appropriate project proposal and plan for the identified business problem / opportunity.
- Identify suitable frameworks, quantitative techniques and research approaches through systematic review of practice and academic literature.
- Analyse collected data using relevant financial and wealth management knowledge, frameworks and models
- Formulate ethical and responsible solutions/ alternatives to address identified business problem / opportunity and propose/ partly implement possible solutions.
- Write and present a comprehensive project report with a high level of personal and group accountability.