

# BBA Minors for non-BBA Students

Personal Financial Planning

## Personal Financial Planning

This minor aims to teach students how to manage their own personal finance and to serve as a professional financial planner. After completing this minor, student should:

- know the basic components of a financial planning process, they include cash management, credit management, insurance and risk management, investment planning, tax planning, retirement planning, and estate planning;
- be able to write a complete financial plan for a client based on his/her ; financial goals and constraints;
- be able to revise a financial plan in light of changes in the client's personal and financial situations as well as external investment environment.

Professional Exemptions from the Society of Registered Financial Planners (HKRFP). Students completing the PFP minor courses will get exemption from HKRFP modules as follows: EF2047 (FP3010 Financial Planning), EF3320 (FP3030 Investment Planning), AC4251 (FP3040 Tax Planning), MS4241 & MS4232 (FP3020 Insurance Planning).

### Year 1

#### **Semester B**

[FB2401](#) Economics II

### Year 2

#### **Semester A**

[EF2047](#) Personal Finance

### Year 2/3

Choose 3 courses from the following list:

#### **Semester A**

[MS4232](#) Casualty Insurance

#### **Semester B**

[AC4251](#) Taxation and Tax Planning

[EF3320](#) Security Analysis and Portfolio Management

[MS4241](#) Life Insurance