

COURSE DETAILS

125.211 The Financial Planning Process

This course introduces students to key components of the financial planning process and aims to improve individual financial literacy. Topics covered include important foundational financial concepts and the role of ethics in financial planning.

125.220 Financial Institutions, Markets and Money

RESTRICTIONS 125.221

The course describes how financial assets are created, traded, and influenced by the key economic variables. It also discusses the influence of central banks and governments on the financial system. Topics covered include the functions and operations of the institutions and markets for financial assets including money, bond, share, foreign exchange and futures markets.

125.240 Fundamentals of Investment

CO-REQUISITE 125.220
RESTRICTION 125.241

This course introduces the quantitative techniques that apply to investment valuation and management. Topics included are the valuing of equity and fixed interest securities, the trade-off between risk and return and an introduction to portfolio management from the financial planning perspective.

125.312 Applied Personal Financial Management

COREQUISITE 125.211
RESTRCITION 125.212

This course serves as an introduction to superannuation in New Zealand and internationally, consumer debt, and personal financial statements. A case study format is used to synthesize course learning objectives.

125.351 Personal Risk Management

PREREQUISITE 125.211
COREQUISITE 125.211

This course provides a risk management perspective of the risks faced by individuals, providing an overview of the process of identifying and evaluating personal risk exposures, and the methods of mitigating their potential impact. The focus is on the premature death, disability, medical and superannuation exposures. The course also provides an introduction to insurance law and regulations.

125.342 Investment Planning

PREREQUISITE 125.230 or 125.240
COREQUISITE 125.220
RESTRICTION 125.340

This course deals with the application of investment valuation techniques and the evaluation of portfolio construction, encompassing fixed income and equities from the perspective of a financial planner.

110.380 Estate and Tax Planning

PREREQUISITE 110.274 or 110.283 or 125.211
COREQUISITE 125.211

This course deals with practical issues arising in estate and tax planning for investors and small businesses in New Zealand. It delves into information pertinent to comprehensive financial advisers.

125.310 Financial Planning Implementation

PREREQUISITES 125.240, 125.351
COREQUISITES One of 110.380, 125.342, 125.356, 125.357
RESTRICTION 125.311

This is a capstone course which assesses the implementation of the financial planning process through an integrated planning structure. The course also surveys a wide range of practice management issues relevant to financial advisers.

NOTE: It is highly recommended that 125.310 be taken after all 7 other diploma courses as the knowledge gained in these courses is needed to successfully complete the diploma.

ENROLMENT INFORMATION

It is advisable to enrol as soon as possible. This will ensure you receive your study material as soon as it is available.

Phone 0800 MASSEY (627 739) and request an enrolment pack. This will then be forwarded to you for you to formally enrol.

For further information on enrolling at Massey University you can visit our web page <http://massey.ac.nz/enrol/>

FURTHER INFORMATION

For further information on the Graduate Diploma in Business Studies endorsed Personal Financial Planning please contact our Programme Support Administrator,

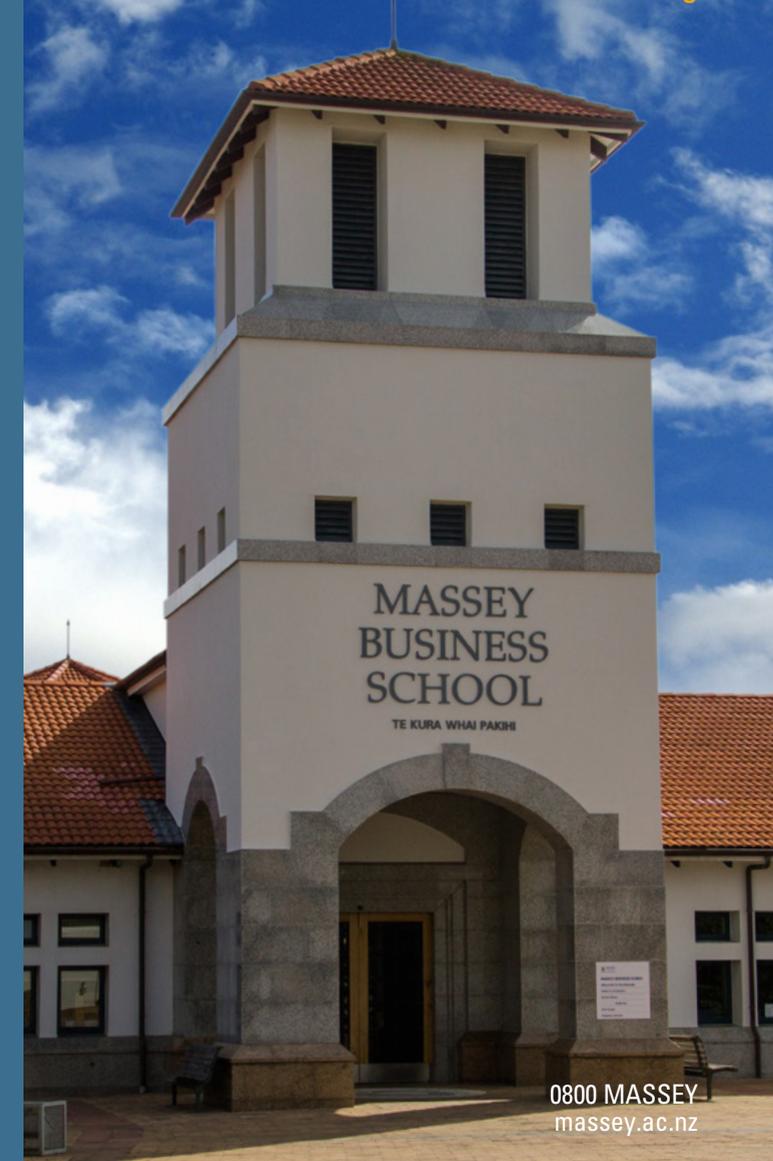
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DISCLAIMER

The information contained in this publication is indicative of the offerings available in 2017 and subsequent years. This information is correct at the time of going to press, but may be subject to change. While all reasonable efforts will be made to ensure listed courses are offered and regulations are up to date, the University reserves the right to change the content or method of presentation, or to withdraw any qualification or part thereof, or impose limitations on enrolments should circumstances require this.

GRADUATE DIPLOMA IN BUSINESS STUDIES

Endorsed in Personal Financial Planning



THE MASSEY ADVANTAGE

When you are looking for the edge in your career, you'll find it at Massey University. The School of Economics & Finance at Massey has a range of programmes designed to take you to the next level of your development.

Whether you're seeking to develop skills to enhance your career, contemplating a career change or wanting to develop your own personal knowledge of personal financial planning, Massey will assist you to become a more effective financial planning professional.

You can study your Graduate Diploma endorsed in Personal Financial Planning in the most convenient way at Massey. The Diploma is available by distance study, so you can study from the comfort of your own home, enabling you to fit the study around your busy working schedule.

All courses have the full backing of Massey's commitment to learning excellence. Your courses and assignments are set, examined and controlled by the highly qualified Massey staff with an emphasis on promoting your success.

WHY A MASSEY UNIVERSITY DIPLOMA?

The Graduate Diploma in Business Studies endorsed in Personal Financial Planning provides a University level education in Financial Planning, satisfying the education requirements for becoming a Certified Financial Planner^{CM}(CFP^{CM}).

The courses promote comprehensive learning in order to prepare students in both a practical and academic way.

WHO SHOULD ENROL?

You should consider the Graduate Diploma in Business Studies if you are:

- contemplating a career in Financial Planning
- seeking to become a Certified Financial Planner^{CM}(CFP^{CM})

Whatever your aims, Massey University's Graduate Diploma in Business Studies will challenge you to become a more effective financial planning professional.

COURSE COSTS

Costs on a per course basis will vary from year to year. Information about current fees is available online at http://www.massey.ac.nz/massey/admission/fees/fees_home.cfm

DIPLOMA STRUCTURE

All courses are offered extramurally. 125.211 The Financial Planning Process is the introductory course and should be taken first. 125.310 Financial Planning Implementation MUST be taken last.

For students studying this Diploma on a part-time basis it is recommended that the courses be taken in the following order.

Course	Semester		
	1	2	3
125.211 The Financial Planning Process	X		X
125.220 Financial Institutions and Markets		X	X
125.240 Fundamentals of Investment	X		
125.312 Applied Personal Financial Management		X	
125.351 Personal Risk Management	X		
125.342 Investment Planning		X	
110.380 Estate and Tax Planning	X		
125.310 Financial Planning Implementation <i>(must be taken last)</i>		X	

Semester 3 = Summer School