Bachelor of Business (Financial Planning)

In this course you will be first introduced to foundational concepts, theories and practices in finance, taxation law and superannuation and retirement planning. You will further build your knowledge and skills in insurance, risk, management and estate planning, financial services and law and personal financial planning. Throughout this course you take part in practical projects including completion of tax returns and analysis of complex capital budgeting problems, superannuation funds and financial regulation issues. Your final two units will focus on advanced investment and client relationship management and financial plan construction.

Why choose this course?
Financial planning profession helps people and businesses to manage their financial affairs and meet their financial goals. Financial planners assist their clients to set their financial goals, prepare financial plans and implement recommendations. They provide advice on: cash flow and liability management; retirement, investment, tax and estate planning; and risk management and insurance planning.

In this course, you will build technical skills to provide effective, holistic solutions to complex and unpredictable financial problems. You will also develop superior communication skills in order to understand your clients’ needs and communicate effectively, ethically and professionally with your clients.

In your discipline units you will gain expertise in the fields of taxation, cash flow modelling, superannuation, insurance and investment planning to suit a diverse range of clients and contexts.

Real-world learning
We will provide you with opportunities to engage with real-world financial problems throughout your degree. You will conclude your degree with a capstone unit, financial plan construction, where you will engage with real-world clients to develop an understanding of their financial planning needs and create a financial plan for the clients.

Entry requirements
Assumed knowledge
It is assumed you have knowledge in the equivalent General Mathematics, or Mathematical Methods, or Specialist Mathematics (Units 3 & 4, C).

Celeste Burke
The best in business

“When deciding where to study, I did a lot of research and I even called a few of my dream potential employers. They shared how QUT graduates were so prepared for the real world and had great practical skills. Once I had heard everybody’s feedback, I knew it had to be QUT.”
Minimum English requirements
Students must meet the English proficiency requirements.

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<th>IELTS (International English Language Testing System)</th>
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<td>Overall</td>
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Course structure
Your Degree at a glance

Year 1
Academically, you will build a base of broad business knowledge through the core units, covering all areas of business from finance and economics through to marketing and global business. Your will start your financial planning legal knowledge in the core unit Business Law & Ethics. Generic skills in all areas will enhance your understanding of how businesses operate within the commercial and legal environment. Commence your financial planning major in second semester by learning fundamental skills in finance and taxation law.

Year 2
You will learn about personal financial planning, superannuation and specific financial planning regulation and law in this year. You can start to build your professional networks and find out more about the financial planning profession. You’ll also start to shape your career with the selection of a second study area.

Year 3
You will draw on the knowledge gained through your major to solve real-world accounting problems especially in terms of managing investments and client relationships and risk management and insurance planning and advice. You will also get practical knowledge of Financial Plan construction in the capstone unit for the degree. For the best chance of a top job to launch your career, attend graduate recruitment events on campus and interact with financial planning industry partners.

Financial Planning major units
- Personal Financial Planning
- Taxation Law
- Finance 1
- Superannuation and Retirement Planning
- Financial Services Regulation and Law
- Insurance, Risk Management and Estate Planning
- Managing Investments and Client Relationships
- Financial Plan Construction

Professional recognition
Graduates who complete the financial planning major will meet the education requirements to seek membership of the Financial Planning Association of Australia (FPA). Graduates will also be ready to participate in the educational qualifications and standards framework set by the Financial Adviser Standards and Ethics Authority (FASEA), which will be required before being able to provide personal financial planning advice to retail clients.