

# THE EDUCATION UNIVERSITY OF HONG KONG

## Course Outline

### Part I

<b>Programme Title</b>	: Postgraduate Diploma in Education (Primary) (One-year Full-time) and (Two-year Part-time) Postgraduate Diploma in Education (Secondary) (One-year Full-time) and (Two-year Part-time)
<b>Programme QF Level</b>	: 6
<b>Course Title</b>	: Empowering Learners' Personal Financial Planning at Schools
<b>Course Code</b>	: IBS5164
<b>Department</b>	: Social Sciences
<b>Credit Points</b>	: 3
<b>Contact Hours</b>	: 39
<b>Pre-requisite(s)</b>	: NIL
<b>Medium of Instruction</b>	: Chinese
<b>Course Level</b>	: Postgraduate

### Part II

The University's 4Cs Learning Framework and seven Generic Intended Learning Outcomes (GILOs) represent the attributes of ideal EdUHK graduates and their expected qualities respectively. Learning outcomes work coherently at the University (GILOs), programme (Programme Intended Learning Outcomes) and course (Course Intended Learning Outcomes) levels to achieve the goal of nurturing students with important attributes embodied in the 4Cs.

The 4Cs are:

- Character and moral responsibility
- Competence and professional excellence
- Cultivation of wisdom and intellectual engagement
- Civic-mindedness & social responsibility

The seven GILOs are:

1. Problem Solving Skills
2. Critical Thinking Skills
3. Creative Thinking Skills
- 4a. Oral Communication Skills
- 4b. Written Communication Skills
5. Social Interaction Skills
6. Ethical Decision Making
7. Global Perspectives

## 1. Synopsis

To enable participants to explore the methods to transfer the knowledge of personal finance and develop the required knowledge and skills in personal financial planning, so that they are able to empower the knowledge of personal financial planning among learners in schools and facilitating them to make their personal financial plans.

## 2. Course Intended Learning Outcomes (CILOs)

*Upon completion of this course, participants will be able to:*

- CILO<sub>1</sub> Analyze the nature of curriculum, aims and content of personal financial planning at secondary schools in Hong Kong
- CILO<sub>2</sub> Understand personal financial planning and have a proper management of personal finance to uphold the living standard and achievement of personal goals of an individual
- CILO<sub>3</sub> develop teaching plan and materials for the teaching and learning of personal financial planning in schools
- CILO<sub>4</sub> demonstrate an ability to adopt appropriate instructional strategies to conduct personal financial planning based on considerations of the learning processes and outcomes to be affected

## 3. Content, CILOs and Teaching & Learning Activities

Course Content	CILOs	Suggested Teaching & Learning Activities
Review of the current curriculum of personal financial planning at secondary schools in Hong Kong	CILO <sub>1</sub>	Lecture; debate; group discussion
Importance of personal financial planning in today's society with basic considerations of personal financial planning such as income, spending, saving, credit and investment	CILO <sub>1,2</sub>	Lecture; individual presentation; internet searching
Overview of various plans in personal finance including budgeting, investment, insurance, retirement planning, and estate planning	CILO <sub>1,2</sub>	Demonstration; debate; simulation; case study; field work; hand-on practice
Various teaching and learning methods of personal financial planning at school level	CILO <sub>3-4</sub>	Demonstration; debate; simulation; case study; field work; co-operative learning; problem-based learning; hand-on practice
Developing instructional plan, assessment strategies and teaching materials in teaching and learning of personal financial planning	CILO <sub>3-4</sub>	

#### 4. Assessment

Assessment Tasks	Weighting (%)	CILO
(a) One individual teaching package with written documentations to deliver knowledge and skills in personal financial planning at school level.	70	CILO <sub>1-4</sub>
(b) A class presentation of the teaching package that may involve elements of micro-teaching or lesson demonstration (objective e).	30	CILO <sub>1-4</sub>

#### 5. Required Text(s)

Ryan, J.S. (2008). *Personal Financial Literacy*. Mason, Ohio: Thomson South-Western.

#### 6. Recommended Readings

Babbage, K. (2007), *Extreme Economics: The Need for Personal Finance in the School Curriculum*. Lanham, Maryland: Bowman & Littlefield Education.

Beam, B. T., & McFadden, J. J. (2005). *Employee Benefits* (7<sup>th</sup> ed.) Chicago: Dearborn Trade.

Bodie, Z., Kane, A., & Marcus, A.J. (2007). *Essentials of Investment* (6<sup>th</sup> ed.). New York: McGraw-Hill.

Cheng, L. (2006). *Kiddomoney: Operation Apple Pie* (7<sup>th</sup> ed.). Hong Kong: Ipbookshop.com.

Clarke, A. (2006). *Integrating ICT Skill for Life with Financial Education*. Leicester: National Institute of Adult Continuing Education.

Gitman, L. J. & Joehnk, M. D. (2005). *Personal Financial Planning*. (10<sup>th</sup> ed.). Cincinnati, Ohio: South-Western/Thomson Learning.

Harrington, S. E., & Niehaus, G. R. (2004). *Risk Management and Insurance* (2<sup>nd</sup> ed.). New York: McGraw-Hill.

Koh, B. & Fong, W.M. (2003). *Personal Financial Planning* (3<sup>rd</sup> ed.). Singapore: Prentice Hall.

Lermitte, P. W. (2002). *Making Allowances: A Dollars-and-Sense Guide to Teaching Kids about Money*. New York: McGraw-Hill.

Vaughan, E. J., & Vaughan, T. M. (2003). *Fundamentals of Risk and Insurance* (9<sup>th</sup> ed.). New York: John Wiley & Sons.

蒂耶利·伽魯瓦 (2007) : 《金錢心理學—為何金錢令人又愛又恨》, 北京, 世界圖書出版公司。

阿雷克斯·戴姆勒 (2005) : 《輕鬆教出消費小高手》, 台灣, 藍鯨出版公司。

## **7. Related Web Resources**

CFP 香港財務策劃師學會 <http://www.ifphk.org/>

CLU ChFC CFP American college <http://www.amercoll.edu/>

Registered FP 香港註冊財務策劃師協會 <http://www.rfp-hk.org/>

Hong Kong Securities Institute <http://www.hksi.org>

## **8. Related Journals**

HK Financial Planner by The Institute of Financial Planners of Hong Kong

Course materials of CFA Level I

Course materials of Financial Planning by CPA Australia

Relevant latest newspaper or journal articles on Personal Financial Planning are to be distributed to participants

## **9. Academic Honesty**

The University adopts a zero tolerance policy to plagiarism. For the University's policy on plagiarism, please refer to the *Policy on Academic Honesty, Responsibility and Integrity with Specific Reference to the Avoidance of Plagiarism by Students* (<https://www.eduhk.hk/re/modules/downloads/visit.php?cid=9&lid=89>).

Participants should familiarize themselves with the Policy.

## **10. Other**

NIL