



香港教育大學

The Education University  
of Hong Kong



# Bachelor of Arts (Honours) in Personal Finance



FACULTY OF LIBERAL ARTS AND SOCIAL SCIENCES

博文及社會科學學院

JUPAS Code: JS8688

EdUHK Programme Code: A4B120

Year 1 Admissions / Senior Year Admissions

# Programme Introduction

The **Bachelor of Arts in Personal Finance** (BA(PF)) is a pioneering undergraduate programme designed specifically to address the financial needs of individuals and households.

## What Makes BA(PF) Unique

- **Personalised Focus** – Further to the training in traditional finance, BA(PF) emphasises personalised financial advising and wealth management, equipping students to effectively meet individual financial needs.
- **Solid Foundations** – Students will master key financial principles, including taxation, credit management, retirement planning, and estate planning.
- **Stay Ahead of Trends** – The programme also covers the latest developments in the global finance sector, such as fintech, risk management, ESG investments, and green and sustainable finance.

## Special Features

- **The First Undergraduate Programme in Personal Finance in Hong Kong**
- **Professional Recognition** – Graduates will receive modular exemptions for Certified Banker (CB) Stage I and the Enhanced Competency Framework on Retail Wealth Management (ECF-RWM) from the Hong Kong Institute of Bankers (HKIB), along with exemptions for Courses 1, 2, and 3 in the Certified Financial Planner (CFP) programme from the Institute of Financial Planners of Hong Kong (IFPHK).
- **Discipline-Based, Practice-Oriented Learning** – Internships, Field Visits, and Business Networking Opportunities.
- **Diversified Career Prospects** – Wealth Management, Family Office Business, Financial Planning, Asset Advising, Credit Analysis, etc.

## Programme Structure

Domain		Credit Points	
		Year 1 Admissions	Senior Year Admissions
Major	Major Core	42	24
	Cross-Faculty Core Course	3	3
	Living and Working in Our Country	3	/
	Major Interdisciplinary Course	3	3
	Internship	3	3
Second Major* / Minor(s) / Electives		30	15
General Education		22	6
Language Enhancement		9	0
Final Year Project (Honours Project / Capstone Project)		6	6
Total		121	60

\*Not applicable for Senior Year Admissions







## Experience Sharing

**GU Zishen**

**2022 Graduate**

**Master of Arts in Personal Finance Education**

“The Programme and the curriculums cover ESG-related topics. This significantly broadened my horizons and sparked my interest in ESG and green finance. The vast financial market in mainland China offers excellent prospects for a career in personal finance, with promising compensation and development opportunities. Completing MA(PFE) programme has been highly beneficial for pursuing a career in personal finance in mainland China.”



**TIAN Jiahe**

**2022 Graduate**

**Master of Arts in Personal Finance Education**

“I chose the MA(PFE) Programme as it offered a wide range of career prospects. Our classmates have pursued diverse careers in financial institutions, banks, investment firms, insurance companies, and mass media. The course contents enhanced my quantitative analytics skills and communication skills, which have been immensely helpful for my current job. The programme also offered numerous opportunities to engage with industry experts, broaden our professional networks, and provide real-world insights.”



**CHEN Weiwei**

**2022 Graduate**

**Master of Arts in Personal Finance Education**

“The widely-covering courses involved the topics of asset allocation, quantitative analysis, and personal financial planning, which not only aligned with my interests and goals of pursuing professional development as a wealth manager, but also equipped me a lot for certification preparation like Chartered Financial Analyst (CFA) and Financial Risk Manager (FRM). The English-teaching environment also helped improve my language skills. Our beloved instructors and classmates were like “family members” in our study and daily lives. I am grateful that EdUHK has provided me with such a high-quality, professional education platform!”

# Entrance Requirements

HKDSE students should have:

- Level 3 or above in English Language and Chinese Language; and
- Level 2 or above in Mathematics (Compulsory Part); and
- “Attained” in Citizenship and Social Development; and
- Level 2 or above in any two elective subjects.

The programme will also consider applicants with recognised qualifications other than HKDSE. Please visit [www.apply.eduhk.hk/ug/nonjupas](http://www.apply.eduhk.hk/ug/nonjupas) for details.

## Career Prospects

It is anticipated that the majority of the graduates of the programme can find a diversity of career options in the finance and financial advisory fields, such as financial planner, asset/investment advisor, credit analyst, financial advisor and education trainer/provider who shall play significant roles as being financial educators through their service provisions to customers.

To facilitate students acquiring relevant finance professional qualifications, the programme covers most of the exam syllabus of the Certified Financial Planner (CFP) and Chartered Financial Analyst (CFA).



### Admission Enquiries

☎ (852) 2948 6886  
✉ [admission@eduhk.hk](mailto:admission@eduhk.hk)  
🌐 [www.apply.eduhk.hk/ug](http://www.apply.eduhk.hk/ug)

### Programme Enquiries

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Any aspect of the courses and course offerings (including, without limitation, the contents of the course and the manner in which the course is taught) may be subject to change at any time at the sole discretion of the University if necessary. Without limiting the generality of the University's discretion to revise the courses and course offerings, it is envisaged that changes may be required due to factors including staffing, enrolment levels, logistical arrangements, curriculum changes, and other factors caused by change of circumstances. Tuition fees, once paid, are non-refundable.

Students admitted into this programme are required to visit the Greater Bay Area (GBA) and/or other parts of Mainland China. The programme may also require students to participate in other non-local learning experience for completion of the programme. While the visits are subsidised, students are required to contribute part of the estimated cost of the visits ('students' contribution'), whereas any personal entertainment, meals expenses, travel document fee and personal insurance costs shall be at students' own expense. The estimated cost of the visits and students' contribution for students admitted to the coming cohort is yet to be available due to a variety of factors such as inflation of cost of the visits, trip duration, traveling expenses, the exchange rate, etc.