

# THE EDUCATION UNIVERSITY OF HONG KONG

## Course Outline

### Part I

<b>Programme Title</b>	<b>: Bachelor of Arts in Personal Finance; all undergraduate programmes</b>
<b>Programme QF Level</b>	<b>: 5</b>
<b>Course Title</b>	<b>: Internship</b>
<b>Course Code</b>	<b>: BUS3055</b>
<b>Department</b>	<b>: Department of Social Sciences and Policy Studies</b>
<b>Credit Points</b>	<b>: 3</b>
<b>Contact Hours</b>	<b>: approximately 200 hours, including lectures, meetings and Internship Programme</b>
<b>Pre-requisite(s)</b>	<b>: Nil</b>
<b>Medium of Instruction</b>	<b>: English</b>
<b>Course Level</b>	<b>: 3</b>

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### Part II

The University's Graduate Attributes 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 graduate attributes.

In gist, the Graduate Attributes for Undergraduate, Taught Postgraduate and Research Postgraduate students consist of the following three domains (i.e. in short "PEER & I"):

- Professional Excellence;
- Ethical Responsibility; &
- Innovation.

The descriptors under these three domains are different for the three groups of students in order to reflect the respective level of Graduate Attributes.

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. Course Synopsis

This course integrates knowledge gained from previous studies. It builds on the conceptual framework of experiential learning to provide the opportunity for programme participants to obtain first-hand experience of frontline personal financial education in the real context through an 8-week supervisory internship programme in the field. The core aim is to facilitate participants to apply contemporary financial theories and practices to personal finance education in authentic situations. It is expected that students can reach for a chance to work in business, non-government organization, and education field (s) to build up their career and network with professional training support through this programme.

### 2. Course Intended Learning Outcomes (CILOs)

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

- CILO<sub>1</sub> Attain the professional hands-on experience of conducting personal financial education in the relevant fields;
- CILO<sub>2</sub> Integrate and apply the latest theories and practices to execute personal finance in insurance industry, wealth management, risk management, green and sustainable finance, ESG investment, Fintech, and the banking;
- CILO<sub>3</sub> Formulate plans and employ strategies or methodologies for personal and career development;
- CILO<sub>4</sub> Demonstrate professional competence and commitment in the authentic workplace; and
- CILO<sub>5</sub> Evaluate the authentic personal financial education practice for ongoing improvement.

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

Course Content	CILOs	Suggested Teaching & Learning Activities
Preparation for the internship: Review of the theories, practices, and strategies on Personal Financial Education being taught in the programmes, and examine their linkage with the Internship Programme	<i>CILO<sub>1,2,3</sub></i>	Discussions / lectures / seminars/ training / tutorials / workshops, web and literature research (3-hr approximately)
Formulation and development of a working plan on Personal Financial Education in the internship – to identify the needs and the possible ways of catering for the needs in the Internship Programme	<i>CILO<sub>1,2,3,5</sub></i>	Discussions / lectures / seminars / training workshops/tutorials, web and literature research (3-hr approximately)
Implementation and evaluation of Internship	<i>CILO<sub>2,4,5</sub></i>	The Internship is offered in every academic year.

Programme		<p>The student interns are required to work for <b>at least 200 hours</b> (or the agreed period between the internship host partner and the University) in a total number of 10 weeks.</p> <p>The student interns will be assigned two supervisors, one from the Internship partners and one from the University throughout the Internship Programme. The detailed work schedule will be agreed by the Supervisor of Internship partners, the Student Interns, and the University Internship Supervisor prior to the commencement of the Internship. The University Internship Supervisors pay regular visits or make phone calls to ascertain if the Internship is effectively implemented, and student Interns are able to demonstrate and achieve the learning outcomes.</p> <p>The University Internship Supervisors conduct the mid-term and final evaluation with the consultation of the Supervisor of Internship partners.</p> <p>Apart from attending the teaching and learning activities in preparing for the Internship, Student Interns are expected to meet with their University Internship Supervisors at least twice during the Internship, including but not limited to the followings:</p> <ul style="list-style-type: none"> <li>– An initial meeting in a pre-internship period to set expectations and discuss execution plans.</li> <li>– A second meeting in the midway of the Internship to discuss the progress and areas for improvement.</li> <li>– A final de-briefing meeting at the end of the Internship to discuss the learning outcomes and insights gained from the Internship.</li> </ul> <p>The University Internship Supervisors will be available during the entire course to provide the necessary support for the Student Interns and maintain effective communication and</p>
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		cooperation with the Internship partners.
Sharing and publishing results and reflection	<i>CILO</i> <sub>1,2,3,4,5</sub>	Reporting, discussing, and appraising the experience of participation in service activities of the Internship Programme in groups. (3-hr approximately)

#### 4. Assessment

Assessment Tasks	Weighting (%)	CILO
a) <u>Proposal of workplace service and implementation plan.</u> – To identify service needs and provide a detailed plan describing how to provide Personal Financial Education service to the internship host partner, including scope, aim, implementation plan, timeline, evaluation methods with reference from academic literature and professional practice (1,000 words).	15%	<i>CILO</i> <sub>1,2,3,4,5</sub>
b) <u>Periodic progress report and Internship supervision evaluation</u> – To prepare a periodic progress report of the working and learning progress, and reflect upon the observations, insights and/or experiences gained from the participation of the Internship process (this periodic progress report will contribute to the Final Reflective Report at the end of the Internship Programme); and – To conduct performance review by the supervisor of Internship partners and the University Internship supervisor based on student interns' professional competence, attitude, and skills as well as their periodic progress report.	55%	<i>CILO</i> <sub>4,5</sub>
c) <u>Presentation and reflective report</u> – To share among course mates about the service needs, service delivery, problems and solutions in service delivery, service outcomes and insights gained from the Internship; and – To submit a Final Reflective Report (2,000 words) on the observations, insights, and	30%	<i>CILO</i> <sub>1,2,3,4,5</sub>

experiences gained from the internship's participation.		
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## 5. Use of Generative AI in Course Assessments

☐ **Not Permitted:** In this course, the use of generative AI tools is not allowed for any assessment tasks.

☒ **Permitted:** In this course, generative AI tools may be used in some or all assessment tasks. Instructors will provide specific instructions, including any restrictions or additional requirements (e.g., proper acknowledgement, reflective reports), during the first lesson and in relevant assessment briefs.

## 6. Required Text(s)

Nil

## 7. Recommended Readings

- Bolton, G., & Delderfield, R. (2018). *Reflective practice : writing and professional development* (Fifth edition.). Los Angeles: SAGE.
- Kiser, P. (2016). *The human services internship: Getting the most from your experience* (Fourth ed.). Cengage Learning.
- Lawrence, D. L. (2014). *The efficient practice: Transform and optimize your financial advisory practice for greater profits* (Wiley finance series). Wiley.
- Lucey, T. A., & Cooter, K. S. (2017). *Financial literacy for children and youth* (2nd ed.). Peter Lang Education.
- Martin, Q. (Ed.). (2022). *Career development and job satisfaction*. New York: Nova Science Publishers.
- Martin, T. V. (2016). *Career development : theories, practices and challenges*. New York: Nova Science Publishers, Inc.
- Patton, W., & McMahon, M. (2021). *Career development and systems theory : connecting theory and practice* (Fourth edition.). Leiden: Brill.
- Ryan, Joan S. (2008). *Personal financial literacy*. Thomson South-Western.
- Sweitzer, H., & King, M. (2019). *The successful internship: Personal, professional, and civic development in experiential learning* (Fifth ed.). Cengage.
- Taillard, M. (2019). *A Practical Guide to Personal Finance: Budget, Invest, Spend*. Alan and Unwin Book Publishers.
- Tillery, S. M., & Tillery, Thomas N. (2017). *Essentials of personal financial planning*. Wiley & Son.
- Walker, R. B., & Walker, K. P. (2017). *Personal finance: Building your future* (2<sup>nd</sup> ed.). McGraw-Hill.
- Zopounidis, C., & Galariotis, E. (2015). *Quantitative financial risk management: Theory and practice*. Wiley.

## 8. Related Web Resources

David A. Kolb on Experiential Learning: [www.infed.org/biblio/b-explrn.htm](http://www.infed.org/biblio/b-explrn.htm)

Experiential Learning articles and critiques of David Kolb's Theory: [www.reviewing.co.uk/research/experiential.learning.htm](http://www.reviewing.co.uk/research/experiential.learning.htm)

Financial Disputes Resolution Centre: [www.fdrc.org.hk](http://www.fdrc.org.hk)

Financial Services Authority (UK) - the Money Advice Service: [www.moneyadviceservice.org.uk](http://www.moneyadviceservice.org.uk)

FoolProofme: [www.foolproofme.org](http://www.foolproofme.org)

Global Personal Financial Education Excellence Center (GFLEC): [www.gflec.org](http://www.gflec.org)  
Hong Kong Monetary Authority: [www.hkma.gov.hk](http://www.hkma.gov.hk)  
Investor and Financial Education Council: [www.ifec.org.hk](http://www.ifec.org.hk)  
Institute of Financial Planners of Hong Kong: [www.ifphk.org](http://www.ifphk.org)  
International Finance Corporation: [www.ifc.org](http://www.ifc.org)  
Mandatory Provident Fund Schemes Authority: [www.mpfa.org.hk/eng/main/index.jsp](http://www.mpfa.org.hk/eng/main/index.jsp)  
Hong Kong Society of Financial Analysts: [www.hksfa.org](http://www.hksfa.org)  
National Standards in K-12 Personal Finance Education | Jump\$tart Coalition:  
[www.jumpstart.org/what-we-do/support-financial-education/standards/](http://www.jumpstart.org/what-we-do/support-financial-education/standards/)  
Office of the Commissioner of Insurance: [www.oci.gov.hk](http://www.oci.gov.hk)  
InvestHK: [www.investhk.gov.hk](http://www.investhk.gov.hk)  
Securities and Futures Commission: [www.sfc.hk/web/EN/index.html](http://www.sfc.hk/web/EN/index.html)

## **9. Related Journals**

*The Journal of Financial Education*  
*Journal of Personal Finance*  
*Journal of International Money and Finance*  
*Journal of Management*  
*Journal of International Financial Markets, Institutions, and Money*  
*International Journal of Managerial Finance*  
*Hong Kong Economic Journal*  
*Financial Times*

## **10. Academic Honesty**

The University upholds the principles of honesty in all areas of academic work. We expect our students to carry out all academic activities honestly and in good faith. Please refer to the *Policy on Academic Honesty, Responsibility and Integrity* (<https://www.eduhk.hk/re/uploads/docs/000000000016336798924548BbN5>). Students should familiarize themselves with the Policy.

## **11. Others**

Outstanding performers in this Internship Programme are entitled for the nomination of the Success PB District Outstanding Internship Performance Scholarship.

*Last updated on 22 July 2025*