

**Course Syllabus
FN 282 Wealth Management
Summer 2021
Bachelor of Economics**

1. Lecturer and course administrator with contact information

- 1.1 Dr. Worapong Janyangyuen Lecturer
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- 1.2. Dr. Worapong Janyangyuen Course administrator

2. Class date and time : Monday/Wednesday/Friday 9.00-12.00

Google Classroom: <https://classroom.google.com/c/NDk2MjQyMTEwMTk1?cic=sq5wlym>

3. Course description

Evaluations of potential customers, personal tax planning, life-cycle investing, measurement of risk of and return on financial assets, portfolio theory, portfolio optimization, investment policy statements, investments in real estate investment trusts, performance evaluation of mutual funds, retirement planning, wealth transfers, heritage, donations, new issues in wealth management

4. Course Objectives

- 1) To enable students understand fundamental concepts of personal wealth management
- 2) To create an understanding and be able to choose financial tools for personal wealth management
- 3) To allow the students to set up goals (wealth creation, retirement, wealth transfer) and be able to collect the data for analysis and planning for personal wealth management.
- 4) To allow students to understand the concept of risk and return on financial asset investment
- 5) To enable students to prepare a portfolio of asset investment

5. Grading criteria

Individual presentation	10%
Quizzes	40%
Book summary	20%
Workshop presentation	10%
Case study presentation	20%
Total	<u>100%</u>

6. Reference material

None

7. Course plan

Tentative class schedule

Session/ Date & Time	Topics	Activities/ Text & Materials/ Media	Lecturer/ remark
1	Overview of Personal Wealth Management	To define and classify wealth, financial product, (asset allocation), and risk diversification	Dr. Worapong Janyangyuen
2	Asset classes	To understand various asset classes for personal investment	Dr. Worapong Janyangyuen
3	Risk and Return on investment	To understand the concept of risk and expected return and how to measure them	Dr. Worapong Janyangyuen
4	Stock Investment Quiz 1	Stock investment technique for new investor – Fundamental analysis and valuation	Dr. Worapong Janyangyuen
5	Stock Investment	Stock investment technique for new investor – Technical analysis	Dr. Worapong Janyangyuen
6	Psychology of Investment	To understand psychology of investment including pattern and guideline of thinking process method for implementation resulted in investment profitability	Dr. Worapong Janyangyuen
7	Bond investment	To understand the concept of bond and its valuation	Dr. Worapong Janyangyuen

Session/ Date & Time	Topics	Activities/ Text & Materials/ Media	Lecturer/ remark
8	Investment in mutual funds and Infrastructure funds Quiz 2	To understand the concept of mutual funds and Infrastructure fund	Dr. Worapong Janyangyuen
9	Financial Planning and Risk Management through insurance	To learn financial planning, risk management, characteristics of life and health insurances that affect financial wealth	Dr. Worapong Janyangyuen
10	Investment in Real Estate and REIT for Creating Wealth	Investment technique in real estate for crating financial wealth	Dr. Worapong Janyangyuen
11	Asset Allocation for Financial Freedom and Wealth Management (Part I) Quiz 3	Personal Finance & Asset Allocation	Dr. Worapong Janyangyuen
12	Presentation on book summary		Dr. Worapong Janyangyuen
13	Asset Allocation for Financial Freedom and Wealth Management (Part II)	Optimal asset allocation technique by financial tools for risk management and wealth creation	Dr. Worapong Janyangyuen
14	Personal Income Tax Management Quiz 4	Personal income tax Tax management technique for financial wealth	Dr. Worapong Janyangyuen
15	Presentation on final case study		Dr. Worapong Janyangyuen