

## Course Outline

### FN282 Wealth Management

**Semester 1/2024 (August 13- December 2, 2024)**

**Lecture Time:** Tuesday, 13.00-16.00 hours

**Lecture Venue:** Room 304

**Teaching Materials Platform:** [Google Classroom / MS Team / Facebook Group / etc. Please specify with an actual URL or access code.]

**Instructor:**

**Name:**

**Office Hours:**

**Email:**

**Phone:**

**Number of Credit:** 3 Credits (3-0-6)

#### **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

#### **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

## Expected Learning Outcomes

### 1. Morality and Ethics

Applicability	Expected Learning Outcomes	Evaluation Method
●	1. Possess honesty, sacrifice, self-social, and environmental responsibility.	
N/A	2. Value “sufficiency” theory and adapt it in life path by adhering to adequacy, rationale, and immunity development.	
N/A	3. Value disciplines, respect, and comply with the rules and regulations of the institution and society at large.	
N/A	4. Acquire knowledge related to business morality and ethics, and be able to handle ethical dilemma with integrity.	

### 2. Knowledge

Applicability	Expected Learning Outcomes	Evaluation Method
N/A	1. Acquire knowledge on and understand the important concepts in business	
●	2. Acquire knowledge on and understand the important social and science concepts related to business management.	
N/A	3. Acquire knowledge on and understand the important concepts related to business processes, planning, corporate structures, operations, control, performance evaluation and contingency plan to suit the circumstances.	

N/A	4. Acquire the knowledge on academic advancement and professional development in business management including the understanding of the situational adaptability and its impacts on business.	
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### 3. Intellectual Development

Applicability	Expected Learning Outcomes	Evaluation Method
●	1. Be able to search and process information and utilize various concepts appropriately in a given circumstance in order to obtain relevant information to benefit in the rapidly changing business environment.	
N/A	2. Be able to think systematically, rationally and creatively and to integrate knowledge from other disciplines to solve the problems in business and other settings.	
N/A	3. Be able to collectively propose solutions to problems at hand and analyze the impacts of the proposed solutions and be able to choose the solution that is appropriate to a given situation to ensure business competitive advantages.	

### 4. Interpersonal Skills and Responsibilities

Applicability	Expected Learning Outcomes	Evaluation Method
N/A	1. Be able to work in team, possess interpersonal skills and leadership skills, and be professionally adaptive to a given situation.	
●	2. Be creative and constructively criticize to solve problem of the team.	
N/A	3. Be responsible in lifelong learning to develop self and professional career.	

## 5. Quantitative Analysis, Communication and Information Technology

Applicability	Expected Learning Outcomes	Evaluation Method
●	1. Be able to apply mathematics, statistics, quantitative analysis in analyzing and making decisions in business and daily life.	
N/A	2. Be able to efficiently communicate in Thai and foreign languages that are relevant in doing Business.	
N/A	3. Be able to explain the issues and make the issues clear in verbal or writing, and be able to choose the appropriate pattern of communication for different groups of audience both in business context and in other contexts.	
N/A	4. Be able to utilize the information technologies or others to support the business operations.	

**Remark: ● Primary expected outcome ○ Secondary expected**

**Main Text:**

**Recommended Texts & Materials:**

**Suggested Readings:**

**Grading Criteria:**

Final exam	20%
Quizzes and Individual Assignment	30%
Book summary	15%
Class participation/ Workshop presentation	15%
Case study presentation	<u>20%</u>
Total	<u>100%</u>

### Tentative Class Schedule:

<b>Session/ Date &amp; Time</b>	<b>Topics</b>	<b>Activities/ Text &amp; Materials/ Media</b>	<b>Lecturer/ remark</b>
1	Overview of Personal Wealth Management	Introduction to Wealth management, Wealth Planning Process, Developing Personal Financial Goals	
2	Asset classes	To understand various asset classes for personal investment	
3	Risk and Return on investment	To understand the concept of risk and expected return and how to measure them	
4	Cash and Credit Management	Understand how to manage cash Financial Instrument for Credit Management	
5	Stock Investment Quiz 1	Stock investment technique for new investor – Fundamental analysis and valuation	
6	Psychology of Investment	To understand psychology of investment including pattern and guideline of thinking process method for implementation resulted in investment profitability	
7	Bond investment	To understand the concept of bond and its valuation	
8	Investment in mutual funds and REIT and Infrastructure funds Quiz 2	To understand the concept of mutual funds and Infrastructure fund	
9	Investment in Alternative Assets	Understand options in alternatives investment and using them to help achieve financial goals	
10	Investment in Real Estate for Creating Wealth	Investment technique in real estate for crating financial wealth	
11	Asset Allocation for Financial Freedom and Wealth Management Quiz 3	Personal Finance & Asset Allocation	
12	Presentation on book summary		
13	Life cycle for investment and retirement planning	Understanding and using all tools to craft financial plan for retirement	
14	Personal Income Tax Management Quiz 4	Personal income tax Tax management technique for financial wealth	
15	Presentation on final case study		

**Final Exam**

