



# AFIN2000

## Principles of Financial Literacy

Session 3, Fully online/virtual 2020

*Department of Applied Finance*

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#### **Disclaimer**

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#### **Notice**

As part of [Phase 3 of our return to campus plan](#), most units will now run tutorials, seminars and other small group learning activities on campus for the second half-year, while keeping an online version available for those students unable to return or those who choose to continue their studies online.

To check the availability of face-to-face and online activities for your unit, please go to [timetable viewer](#). To check detailed information on unit assessments visit your unit's iLearn space or consult your unit convenor.

## General Information

Unit convenor and teaching staff

Unit Convenor

Mark Stewart

[mark.stewart@mq.edu.au](mailto:mark.stewart@mq.edu.au)

Contact via Refer to ilearn

Refer to ilearn

Refer to ilearn

Angela Chow

[angela.chow@mq.edu.au](mailto:angela.chow@mq.edu.au)

Credit points

10

Prerequisites

70cp at 1000 level or above

Corequisites

Co-badged status

Unit description

This unit develops financial literacy, enabling students to understand what is needed to achieve a lifestyle that is financially sustainable, ethical and responsible. On completion of the unit, students will be able to set financial goals, establish a working budget, understand and distinguish between different investment instruments, and have the knowledge and skills to make informed and effective personal financial decisions.

## Important Academic Dates

Information about important academic dates including deadlines for withdrawing from units are available at <https://www.mq.edu.au/study/calendar-of-dates>

## Learning Outcomes

On successful completion of this unit, you will be able to:

**ULO1:** Explain the role of financial goals and develop personal financial goals.

**ULO2:** Assess, compare and evaluate common investment instruments.

**ULO3:** Acquire knowledge and skills to make informed and effective personal financial decisions.

## General Assessment Information

It is the responsibility of students to view their marks for each within session assessment on iLearn within 20 working days of posting. If there are any discrepancies, students must contact the unit convenor immediately. Failure to do so will mean that queries received after the release of final results regarding assessment marks (not including the final exam mark) will not be addressed.

Assessment criteria for all assessment tasks will be provided on the unit iLearn site.

## Assessment Tasks

Name	Weighting	Hurdle	Due
<a href="#">Forum Discussion</a>	18%	No	date to be confirmed - see iLearn
<a href="#">Online Quiz</a>	27%	No	date to be confirmed - see iLearn
<a href="#">Final Examination</a>	55%	No	date to be confirmed - see iLearn

### Forum Discussion

Assessment Type <sup>1</sup>: Participatory task

Indicative Time on Task <sup>2</sup>: 10 hours

Due: **date to be confirmed - see iLearn**

Weighting: **18%**

Students are required to contribute to the Discussion Forums. Details will be provided on the iLearn unit.

On successful completion you will be able to:

- Explain the role of financial goals and develop personal financial goals.
- Assess, compare and evaluate common investment instruments.
- Acquire knowledge and skills to make informed and effective personal financial decisions.

### Online Quiz

Assessment Type <sup>1</sup>: Quiz/Test

Indicative Time on Task <sup>2</sup>: 6 hours

Due: **date to be confirmed - see iLearn**

Weighting: **27%**

Student will be required to complete four online quizzes. The questions will be based on the materials covered.

On successful completion you will be able to:

- Explain the role of financial goals and develop personal financial goals.
- Assess, compare and evaluate common investment instruments.
- Acquire knowledge and skills to make informed and effective personal financial decisions.

## Final Examination

Assessment Type <sup>1</sup>: Examination

Indicative Time on Task <sup>2</sup>: 20 hours

Due: **date to be confirmed - see iLearn**

Weighting: **55%**

A 2 hour open book final exam will be held online.

On successful completion you will be able to:

- Explain the role of financial goals and develop personal financial goals.
- Assess, compare and evaluate common investment instruments.
- Acquire knowledge and skills to make informed and effective personal financial decisions.

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<sup>1</sup> If you need help with your assignment, please contact:

- the academic teaching staff in your unit for guidance in understanding or completing this type of assessment
- the [Writing Centre](#) for academic skills support.

<sup>2</sup> Indicative time-on-task is an estimate of the time required for completion of the assessment task and is subject to individual variation

## Delivery and Resources

Please note: This is an online course and therefore it is the student's responsibility to have the technology to access the material and to complete the assigned tasks. No exceptions or extensions will be granted because of issues with the student's technology, the student's internet provider or the student's internet connectivity.

There are no face to face lectures.

All unit materials will be provided on iLearn. These include, information on each topic (overview slides, text materials, overview videos), "in the news" items and supplementary notes.

All assessment materials will be provided on iLearn. The quizzes and the discussion forums and the final exam will ALL be undertaken on iLearn.

Tutorial support will be provided by a Unit Help Desk on iLearn.

## Unit Schedule

**AFIN2000 Principles of Financial Literacy**

**2020 Session 3**

### Topic Guide - Schedule

Week	Commencing on	Topic	Details	Text chapter
S3 Week 1	30 Nov	Topic 1	Personal finance basics	Chapter 1
		Topic 2	Money management	Chapter 2
		Topic 3	Setting goals and objectives	Chapter 2
S3 Week 2	07 Dec	Topic 4	Investments - fundamentals	Chapter 11
		Topic 5	Investments - bonds	Chapter 11
S3 Week 3	14 Dec	Topic 6	Investments – equity	Chapter 12
		Topic 7	Investments – managed funds	Chapter 13
			Mid session break	
S3 Week 4	04 Jan	Topic 8	Investments – strategy	Chapter 13
		Topic 9	Home selection and financing	Chapter 7
		Topic 10	Home and auto insurance	Chapter 8
S3 Week 5	11 Jan	Topic 11	Superannuation	Chapter 14
		Topic 12	Retirement and Estate planning	Chapter 14
			Revision	

## Policies and Procedures

Macquarie University policies and procedures are accessible from [Policy Central \(https://staff.mq.edu.au/work/strategy-planning-and-governance/university-policies-and-procedures/policy-centr](https://staff.mq.edu.au/work/strategy-planning-and-governance/university-policies-and-procedures/policy-centr)

al). Students should be aware of the following policies in particular with regard to Learning and Teaching:

- [Academic Appeals Policy](#)
- [Academic Integrity Policy](#)
- [Academic Progression Policy](#)
- [Assessment Policy](#)
- [Fitness to Practice Procedure](#)
- [Grade Appeal Policy](#)
- [Complaint Management Procedure for Students and Members of the Public](#)
- [Special Consideration Policy](#) (**Note:** *The Special Consideration Policy is effective from 4 December 2017 and replaces the Disruption to Studies Policy.*)

Students seeking more policy resources can visit the [Student Policy Gateway](https://students.mq.edu.au/support/study/student-policy-gateway) (<https://students.mq.edu.au/support/study/student-policy-gateway>). It is your one-stop-shop for the key policies you need to know about throughout your undergraduate student journey.

If you would like to see all the policies relevant to Learning and Teaching visit [Policy Central](http://staff.mq.edu.au/work/strategy-planning-and-governance/university-policies-and-procedures/policy-central) (<http://staff.mq.edu.au/work/strategy-planning-and-governance/university-policies-and-procedures/policy-central>).

## Student Code of Conduct

Macquarie University students have a responsibility to be familiar with the Student Code of Conduct: <https://students.mq.edu.au/study/getting-started/student-conduct>

## Results

Results published on platform other than [eStudent](#), (eg. iLearn, Coursera etc.) or released directly by your Unit Convenor, are not confirmed as they are subject to final approval by the University. Once approved, final results will be sent to your student email address and will be made available in [eStudent](#). For more information visit [ask.mq.edu.au](http://ask.mq.edu.au) or if you are a Global MBA student contact [globalmba.support@mq.edu.au](mailto:globalmba.support@mq.edu.au)

## Supplementary exams

Information regarding supplementary exams, including dates, is available at: [http://www.businessandeconomics.mq.edu.au/current\\_students/undergraduate/how\\_do\\_i/disruption\\_to\\_studies](http://www.businessandeconomics.mq.edu.au/current_students/undergraduate/how_do_i/disruption_to_studies)

## Student Support

Macquarie University provides a range of support services for students. For details, visit <http://students.mq.edu.au/support/>

## Learning Skills

Learning Skills ([mq.edu.au/learningskills](http://mq.edu.au/learningskills)) provides academic writing resources and study strategies to help you improve your marks and take control of your study.

- [Getting help with your assignment](#)

- [Workshops](#)
- [StudyWise](#)
- [Academic Integrity Module](#)

The Library provides online and face to face support to help you find and use relevant information resources.

- [Subject and Research Guides](#)
- [Ask a Librarian](#)

## Student Services and Support

Students with a disability are encouraged to contact the [Disability Service](#) who can provide appropriate help with any issues that arise during their studies.

## Student Enquiries

For all student enquiries, visit Student Connect at [ask.mq.edu.au](http://ask.mq.edu.au)

If you are a Global MBA student contact [globalmba.support@mq.edu.au](mailto:globalmba.support@mq.edu.au)

## IT Help

For help with University computer systems and technology, visit [http://www.mq.edu.au/about\\_us/offices\\_and\\_units/information\\_technology/help/](http://www.mq.edu.au/about_us/offices_and_units/information_technology/help/).

When using the University's IT, you must adhere to the [Acceptable Use of IT Resources Policy](#). The policy applies to all who connect to the MQ network including students.