

Annexe A: New/Revised Course Content in OBTL+ Format

Course Overview

The sections shown on this interface are based on the templates [UG OBTL+](#) or [PG OBTL+](#)

If you are revising/duplicating an existing course and do not see the pre-filled contents you expect in the subsequent sections e.g. Course Aims, Intended Learning Outcomes etc. please refer to [Data Transformation Status](#) for more information.

Expected Implementation in Academic Year	
Semester/Trimester/Others (specify approx. Start/End date)	
Course Author * Faculty proposing/revising the course	Bryan Low Yi Teng
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Course Title	WEALTH MANAGEMENT
Course Code	BF2206
Academic Units	0
Contact Hours	52
Research Experience Components	

Course Requisites (if applicable)

Pre-requisites	AB102 or AB1201
Co-requisites	
Pre-requisite to	
Mutually exclusive to	
Replacement course to	
Remarks (if any)	

Course Aims

This course provides an intermediate study on the subject of wealth management and contemporary personal financial management. Students will learn and experience current macro-economic analysis and its application. The course will touch on more complex wealth management topics such as trusts, estate planning and private banking.

By the end of the course, students will be technically competent to put together their own personal financial plan. Students looking to a career in Wealth Management/Private Banking will find the knowledges and frameworks taught to be immediately applicable.

Course's Intended Learning Outcomes (ILOs)

Upon the successful completion of this course, you (student) would be able to:

ILO 1	Apply various frameworks used in Wealth Management and Financial Planning
ILO 2	Create a suitable and relevant insurance portfolio illustrating various insurance types, cost/benefits
ILO 3	Explain the basic macro-economic analysis and the implications to asset allocation
ILO 4	Apply various instruments used in constructing a portfolio, namely; direct (vanilla) methods, mutual funds/unit trusts, and structured products.
ILO 5	Explain the working of Trusts and other wealth planning structures
ILO 6	Explain the workings of Private Banking
ILO 7	Put together an executable wealth plan in an Asian context.

Course Content

-Wealth Management Frameworks -Risk management / Insurance portfolio management -Macro-economic analysis for wealth management -Asset classes -Direct entry into asset classes -Funds -Structured Products - Trusts / Wealth Planning

Reading and References (if applicable)

Notes will be provided for wealth management frameworks and the theoretical aspects of the course. Updated economic reports from various sources will be provided on a timely basis to allow the student to appreciate a real and current world view for your macro-economic analysis.

Planned Schedule

Week or Session	Topics or Themes	ILO	Readings	Delivery Mode	Activities
1	Introduction	1	Handouts	In-person	
2	Frameworks	1	Handouts	In-person	
3	Macro Analysis for WM	3	Handouts	In-person	
4	Risk Management	2	Handouts	In-person	
5	Entry – Direct	4	Handouts	In-person	
6	Entry – Funds	4	Handouts	In-person	
7	Entry – Structured Products	4	Handouts	In-person	
8	Alternatives	4	Handouts	In-person	
9	Wealth Planning and Introduction to Private Banking	5, 6	Handouts	In-person	
10	Presentation	7		In-person	
11	Presentation	7		In-person	
12	Revision Seminar				

Learning and Teaching Approach

Approach	How does this approach support you in achieving the learning outcomes?
Lectures	The interactive lecture session where there is ample opportunities for open discussion on the conceptual questions raised in the class allows you to think critical and share their ideas and concept with the class. This also allows me to get the concepts clearly through the entire class by involving you and ensure that the targeted learning outcomes are being achieved
Tutorials	This would allow you to crack some intriguing problems and thus help me achieve the learning outcome.
Individual assignment(s)	The assignments require you to generate, analyze and deliver humorous materials in a guided manner.
In-Class activities	Some learning outcomes for this course are skills which are practical in nature and cannot be achieved by reading and writing. The achievement of such learning outcomes requires hands-on experience, in-class activities provide such opportunities.

Assessment Structure

Assessment Components (includes both continuous and summative assessment)

No.	Component	ILO	Related PLO or Accreditation	Weightage	Team/Individual	Rubrics	Level of Understanding
1	Summative Assessment (EXAM): Final exam(Final Examination)	1-5	Critical Thinking, Acquisition of knowledge	40	Individual		
2	Continuous Assessment (CA): Project(Group Project (written report and/or * in-class presentation))	1-7	Critical Thinking, Acquisition of knowledge	50			
3	Continuous Assessment (CA): Class Participation(Participation)	1-7	Teamwork & Interpersonal Skills	10	Individual		

Description of Assessment Components (if applicable)

Important Notes:

Note: All students will be required to complete a peer evaluation for the group project.

Formative Feedback

The project is essentially a wealth plan that you will build based on a real individual based on a life stage. Prior to the main project, there will be 3 ungraded presentations that I will give you feedback to improve, i.e. you will have opportunities to work on the identified gaps prior to the graded assessments. As you work on your project, you will be using content and knowledge learnt, your application to the program will be a reflection of your understanding and reaching out for feedback.

NTU Graduate Attributes/Competency Mapping

This course intends to develop the following graduate attributes and competencies (maximum 5 most relevant)

Attributes/Competency	Level
Adaptability	Advanced
Communication	Advanced
Curiosity	Advanced
Sense Making	Intermediate

Course Policy

Policy (Academic Integrity)

Policy (General)

You are expected to attend all seminar classes punctually and take all scheduled assignments and tests by due dates. You are expected to take responsibility to follow up with course notes, assignments and course related announcements for seminar sessions they have missed. You are expected to participate in all seminar discussions and activities.

Policy (Absenteeism)

Absence from class without a valid reason will affect your overall course grade. Valid reasons include falling sick supported by a medical certificate and participation in NTU's approved activities supported by an excuse letter from the relevant bodies.

If you miss a seminar, you must inform the course instructor via email prior to the start of the class.

Policy (Others, if applicable)

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