

## H8AFP: Applied Financial Planning

Module Code:	H8AFP
Long Title	Applied Financial Planning <b>APPROVED</b>
Title	Applied Financial Planning
Module Level:	LEVEL 8
EQF Level:	6
EHEA Level:	First Cycle
Credits:	5
Module Coordinator:	JONATHAN BRITTAIN
Module Author:	Philip Shanahan
Departments:	School of Business
Specifications of the qualifications and experience required of staff	
<b>Learning Outcomes</b>	
<i>On successful completion of this module the learner will be able to:</i>	
<b>#</b>	<b>Learning Outcome Description</b>
LO1	Demonstrate an in-depth understanding of holistic financial planning and be able to apply this understanding in a practical way
LO2	Assess a case study and determine appropriate recommendations, taking a clients full circumstances into account
LO3	Prioritise a client's needs in situations where there are multiple needs but limited budget available
LO4	Critically assess a pre-prepared set of recommendations, taking into account a client's needs, family and business circumstances, financial position and attitude to investment risk.
LO5	Develop a professional relationship with clients based on trust and credibility.
<b>Dependencies</b>	
<b>Module Recommendations</b>	
20840	H8LNS Loans
<b>Co-requisite Modules</b>	
No Co-requisite modules listed	
<b>Entry requirements</b>	

# H8AFP: Applied Financial Planning

Module Content & Assessment			
Indicative Content			
<b>Holistic Financial Planning</b> • What is holistic financial planning • The financial planning cycle • The main financial needs • Hierarchy of needs			
<b>The Fact-find</b> • Sections of the fact-find • Why information is required • Consumer protection code and knowing your consumer			
<b>Making Recommendations</b> • Consumer protection code and suitability • Finding the most suitable product • Creating a statement of suitability for multiple recommendations • Presenting recommendations, skill and methodology			
<b>Communication Skills and Financial Planning</b> The role of the personal financial planner; effective questioning; listening; negotiation skills.			
<b>Estate Planning and Legal Considerations</b> Wills and succession; separation and divorce; transferring ownership of assets; holistic advice and estate planning; policy ownership			
<b>Quantifying financial needs</b> Calculating shortfalls in life assurance, retirement planning, and savings			
<b>Case Studies</b> Three case studies with varying needs.			
Assessment Breakdown			%
Coursework			50.00%
End of Module Assessment			50.00%
<b>Assessments</b>			
Full Time			
Coursework			
<b>Assessment Type:</b>	Multiple Choice Questions	<b>% of total:</b>	50
<b>Assessment Date:</b>	n/a	<b>Outcome addressed:</b>	1,2,3,4,5
<b>Non-Marked:</b>	No		
<b>Assessment Description:</b> 100 MCQ's based on knowledge gained throughout the PFP programme			
End of Module Assessment			
<b>Assessment Type:</b>	Terminal Exam	<b>% of total:</b>	50
<b>Assessment Date:</b>	End-of-Semester	<b>Outcome addressed:</b>	1,2,3,4,5
<b>Non-Marked:</b>	No		
<b>Assessment Description:</b> End-of-Semester Final Examination			
No Workplace Assessment			
Reassessment Requirement			
<b>Repeat failed items</b> <i>The student must repeat any item failed</i>			

## H8AFP: Applied Financial Planning

Module Workload				
Module Target Workload Hours 0 Hours				
Workload: Part Time				
Workload Type	Workload Description	Hours	Frequency	Average Weekly Learner Workload
Lecture	Class based lecture	12	Per 15 week block	0.80
Tutorial	Class based tutorial, working on case study type exercises	6	Per 15 week block	0.40
Assignment	Research and completion of case study	47	Per 15 week block	3.13
Independent Learning	Independent study and research	60	Per 15 week block	4.00
Total Weekly Contact Hours				1.20

Module Resources	
<i>Recommended Book Resources</i>	
<p>Chartered Insurance Institute (UK). (2011), Integrated Financial Planning, BPP Learning Media, London.</p> <p>Barrett, M.. (2008), Financial services advertising: Law and regulation, Clarus Press Ltd..</p>	
<i>Supplementary Book Resources</i>	
<p>BPP Learning Media. (2011), Diploma in regulated financial planning R05 - Financial protection: Pass cards, 2010/11 tax year edn. BPP Learning Media.</p> <p>BPP Learning Media. Financial protection: Study text, 2010/11 tax year edn. BPP Learning Media.</p> <p>BPP Learning Media (2010). Regulations and ethics: UK financial services, Ingram Publisher.</p> <p>Harvey, N. (2010), Effective communication, 3rd edn. Gill &amp; Macmillan, Dublin.</p>	
<i>This module does not have any article/paper resources</i>	
<i>Other Resources</i>	
<p>[Website], Central Bank. Central Bank,  <a href="http://www.centralbank.ie">http://www.centralbank.ie</a></p> <p>[Website], Revenue. Revenue,  <a href="http://www.revenue.ie">http://www.revenue.ie</a></p> <p>[Website], Competition and Consumer Protection Commission. Competition and Consumer Protection Commission,  <a href="http://www.consumerhelp.ie">http://www.consumerhelp.ie</a></p> <p>[Website], Better Regulation. Better Regulation,  <a href="http://www.betterregulation.com">http://www.betterregulation.com</a></p> <p>[Website], Citizens Information. Citizens Information,  <a href="http://www.citizensinformation.ie">http://www.citizensinformation.ie</a></p>	
Discussion Note:	