

Personal Finance

Module Information

2022.01, Approved

Summary Information

Module Code	6013LBSBW
Formal Module Title	Personal Finance
Owning School	Business and Management
Career	Undergraduate
Credits	20
Academic level	FHEQ Level 6
Grading Schema	40

Teaching Responsibility

LJMU Schools involved in Delivery
Business and Management

Learning Methods

Learning Method Type	Hours
Lecture	11
Online	11
Seminar	22

Module Offering(s)

Display Name	Location	Start Month	Duration Number Duration Unit
JAN-MTP	MTP	January	12 Weeks

Aims and Outcomes

Aims	To provide students with a rigorous framework within which to make personal financial decisions.
------	--

After completing the module the student should be able to:

Learning Outcomes

Code	Number	Description
MLO1	1	Critically analyse the role of financial service providers and securities markets and evaluate critically the implications of an efficient capital market.
MLO2	2	Critically evaluate the regulatory and taxation framework and the impact upon personal investment decisions.
MLO3	3	Critically analyse and evaluate personal investment strategies and their implications of personal debt.
MLO4	4	Critically explain and appraise the risk-return trade-off, the role of portfolio theory, market risk and evaluate portfolio performance.

Module Content

Outline Syllabus	Major Personal Financial Decisions and the Products./Services & Providers (Institutions & Markets) The Regulatory & Taxation Framework and the impact on personal financial decisions. Savings Personal Debt & Debt Management Retirement Planning - Pensions & Annuities The Housing Market & Mortgage Products Life assurance & Assurance Related Investments Investments - Real & Financial; Portfolio Theory; Risk & Return Stock Markets & Investing in Shares Evaluating Portfolio Performance. Inheritance Tax & Wills Financial Planning.
Module Overview	
Additional Information	The module evaluates financial products and their management within a personal finance background

Assessments

Assignment Category	Assessment Name	Weight	Exam/Test Length (hours)	Module Learning Outcome Mapping
Portfolio	Report	50	0	MLO1, MLO2
Portfolio	Presentation	50	0	MLO3, MLO4

Module Contacts

Module Leader

Contact Name	Applies to all offerings	Offerings
Lucy McGrath	Yes	N/A

Partner Module Team

Contact Name	Applies to all offerings	Offerings