



香港教育大學
The Education University
of Hong Kong

Empowering smart financial futures

Bachelor of Arts (Honours) in Personal Finance

Year 1 Admissions Senior Year Admissions

EdUHK Programme Code: A4B120

JUPAS Code: JS8688



FACULTY OF LIBERAL ARTS AND SOCIAL SCIENCES
博文及社會科學學院



Programme Introduction

The **Bachelor of Arts in Personal Finance** (BA(PF)) is a pioneering undergraduate programme designed specifically to address the financial needs of individuals and households.

What Makes BA(PF) Unique

- **Personalised Focus** – Further to the training in traditional finance, BA(PF) emphasises personalised financial advising and wealth management, equipping students to effectively meet individual financial needs.
- **Solid Foundations** – Students will master key financial principles, including taxation, credit management, retirement planning, and estate planning.
- **Stay Ahead of Trends** – The programme also covers the latest developments in the global finance sector, such as fintech, risk management, ESG investments, and green and sustainable finance.

Programme Features

- **The First Undergraduate Programme in Personal Finance in Hong Kong**
- **Professional Recognition** – Graduates will receive modular exemptions for Certified Banker (CB) Stage I and the Enhanced Competency Framework on Retail Wealth Management (ECF-RWM) from the Hong Kong Institute of Bankers (HKIB), along with exemptions for Courses 1, 2, and 3 in the Certified Financial Planner (CFP) programme from the Institute of Financial Planners of Hong Kong (IFPHK).
- **Discipline-Based, Practice-Oriented Learning** – Internships, Field Visits, and Business Networking Opportunities.
- **Diversified Career Prospects** – Wealth Management, Family Office Business, Financial Planning, Asset Advising, Credit Analysis, etc.

Programme Structure

Domain		Credit Points	
		Year 1 Admissions	Senior Year Admissions
Major	Major Core	42	24
	Cross-Faculty Core Course	3	3
	Living and Working in Our Country	3	/
	Major Interdisciplinary Course	3	3
	Internship	3	3
Second Major* / Minor(s) / Electives		30	15
General Education		22	6
Language Enhancement		9	0
Final Year Project (Honours Project / Capstone Project)		6	6
Total		121	60

* Not applicable for Senior Year Admissions

Experience Sharing

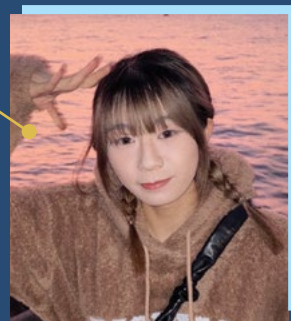


WU Linliang
Year 4 Student

The Programme has equipped me with more than just financial theories. By consistently taking every assignment and exam carefully, I have cultivated a strong sense of self-affirmation. I developed a habit of planning semester tasks and daily to-do lists, which trained my discipline and time management skills. Regular exercise keeps me confident and energetic, reinforcing a positive mindset that extends to my studies. I have also learnt not to confine myself to a single career path; instead, focusing on the present makes my future direction clearer. These practices not only earned me the Yip Kwong Kan Scholarship but also built resilience and adaptability, qualities essential for a sustainable career in personal finance, whether in Hong Kong or the broader mainland market.

The Programme offers compulsory internships at financial institutions, interdisciplinary experiences, and language enhancement courses, all of which have pushed me out of my comfort zone. In the “Global Business Environment and Financial Markets” course, the professor guided us to analyse international financial dynamics, including interest rate trends and regional economic integration. The “Banking and Credit” course introduced us to banking practices through simulated credit assessment

LAW Tsz Yan
Year 2 Student



exercises, allowing me to connect theory with real-world decision-making. The AI literacy course equipped me with foundational application concepts, paving the way for integrating technology with my finance profession in the future.



Entrance Requirements

HKDSE students should have:

- Level 3 or above in English Language and Chinese Language; and
- Level 2 or above in Mathematics (Compulsory Part); and
- “Attained” in Citizenship and Social Development; and
- Level 2 or above in any two elective subjects.

The programme will also consider applicants with recognised qualifications other than HKDSE.

Please visit www.apply.eduhk.hk/ug/nonjupas for details.

Career Prospect

It is anticipated that the majority of the graduates of the programme can find a diversity of career options in the finance and financial advisory fields, such as financial planner, asset/investment advisor, credit analyst, financial advisor and education trainer/provider who shall play significant roles as being financial educators through their service provisions to customers.

To facilitate students acquiring relevant finance professional qualifications, the programme covers most of the exam syllabus of the Certified Financial Planner (CFP) and Chartered Financial Analyst (CFA).

Admission Enquiries

 (852) 2948 6886
 admission@eduhk.hk
 www.apply.eduhk.hk/ug

Programme Enquiries

 Department Office
 ssps@eduhk.hk



Every effort has been made to ensure the accuracy of the information contained in this leaflet. Changes to any aspects of the programmes may be made from time to time as due to change of circumstances and the University reserves the right to revise any information contained in this leaflet as it deems fit without prior notice. The University accepts no liability for any loss or damage arising from any use or misuse of or reliance on any information contained in this leaflet.

Any aspect of the courses and course offerings (including, without limitation, the contents of the course and the manner in which the course is taught) may be subject to change at any time at the sole discretion of the University if necessary. Without limiting the generality of the University's discretion to revise the courses and course offerings, it is envisaged that changes may be required due to factors including staffing, enrolment levels, logistical arrangements, curriculum changes, and other factors caused by change of circumstances. Tuition fees, once paid, are non-refundable.

Students admitted into this programme are required to visit the Greater Bay Area (GBA) and/or other parts of the Chinese Mainland. The programme may also require students to participate in other non-local learning experience for completion of the programme. While the visits are subsidised, students are required to contribute part of the estimated cost of the visits (“students’ contribution”), whereas any personal entertainment, meals expenses, travel document fee and personal insurance costs shall be at students’ own expense. The estimated cost of the visits and students’ contribution for students admitted to the coming cohort is yet to be available due to a variety of factors such as inflation of cost of the visits, trip duration, traveling expenses, the exchange rate, etc.