



Master of Arts in Personal Finance

個人理財文學碩士課程

One-year Full-time (A1M154) / Two-year Part-time (C2M070)

Financial Studies | Personal Financial Planning | Wealth Management

Programme Features

- A taught master's programme in financial studies
- Integrating wealth management with personal financial planning
- Nurturing professionals for financial services

Aligning with Hong Kong, China's development strategies, which position it as an **international hub for asset and wealth management**

Elective courses and the Research Project option give students **multiple learning** pathways to achieve their diverse development goals

Bright future **career prospects in financial services**, including banking, securities, credits, and some emerging fields such as private wealth management, family office, ESG consulting, green finance, etc.

All subjects are taught in English, preparing students to engage in cross-border and globalised financial services.

Recognised by several financial professional bodies. Graduates are eligible for partial exemptions when attending some **financial certifications** in Hong Kong, China

Applicants without an academic background in finance or business are also welcome to enrol, responding to the industrial demands for **versatile talents**

Programme Overview

Type	Area of Study	Medium	Study Period	Total Credit Points
Taught Master's Degree	Business and Management	English	Full-time: 1 year Part-time: 2 years	24 CPs

Programme Structure

There are two options for students to complete the 24 credit points for graduation:

1. Students who opt for coursework will need to take 8 courses

Component	Credit Points (CPs)
All 6 core courses and 2 Electives	24
Total	24

2. Students who have sufficient research competencies, obtained approval, and opt for the Research Project, can be exempted from taking elective courses. Their study path is as follows:

Component	Credit Points (CPs)
6 core courses	18
Research Project	6
Total	24

Course List

Core Courses	Elective#	Research Project
Global Financial Market and Instruments	Quantitative Analysis for Financial Studies	Research Project
FinTech and Consumer Finance	Financial Literacy Education for All Aged Groups	# The offering of elective courses and the quota offered is subject to the programme's decision and student enrolment. It may vary in each academic year.
Ethical Issues and Decision Making in Personal Finance	Family Office Management	
Sustainable Finance and ESG Investment	Internship Programme in Personal Finance Education	
Investment Analysis and Risk Management	Contemporary Issues in Personal Finance Education	
Comprehensive Practical Financial Planning		

Teaching Team

EdUHK and its Business Studies Team are dedicated to the teaching and research in the field of personal finance, and have also made outstanding achievements in the industry collaboration, community engagement and knowledge transfer.

Faculty members actively promote research and development across business and financial studies, financial literacy, sustainability, and personal financial planning. They bring students into real-world inquiry through industry-relevant learning and cases.

The faculty members and the Programme's learning support team provide students with advisory support in their preparation for various business-related competitions.



EdUHK and its Business Studies Team have obtained a number of prestigious awards or recognitions from the financial industry in Hong Kong, China.

EdUHK was awarded the Corporate Financial Education and ESG Leadership Gold Award 2024 by The Institute of Financial Planners of Hong Kong, recognising the University's efforts in improving the financial literacy and contribution to promoting the ESG goals in Hong Kong, China.

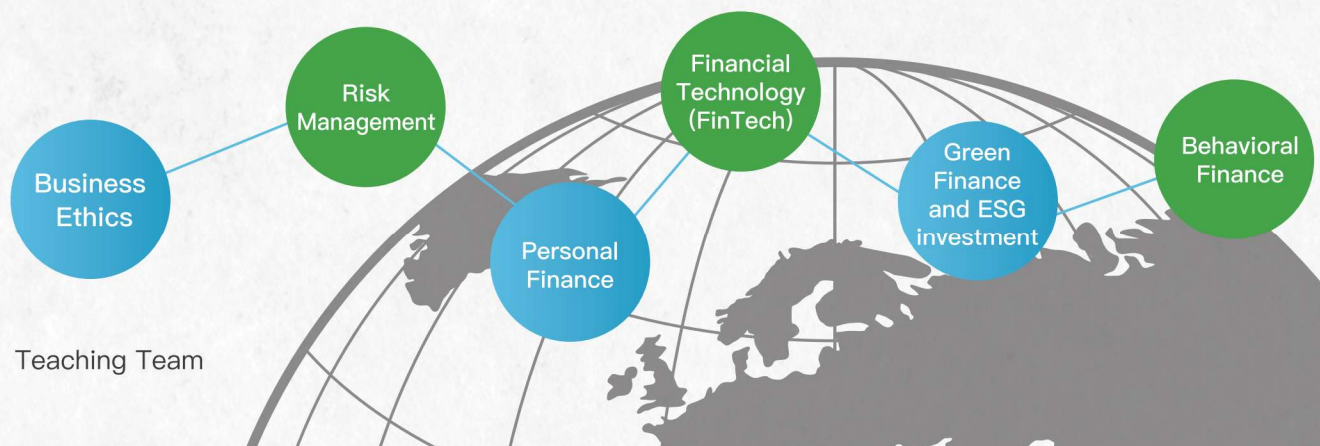
Core members : Dr Tan Weiqiang, Professor Christina Yu Wai-mui, and Dr Eric Law Kim-fai



Financial Education Team of EdUHK was awarded the Bronze prize (Teaching Division) at the Investor and Financial Education Award 2024 (IFEA 2024) by the Investor and Financial Education Council (IFEC) under the Security and Futures Commission (SFC).

Core members : Dr Tan Weiqiang, Professor Christina Yu Wai-mui, Dr Eric Law Kim-fai, and Dr Ray Lee Kwok-wai

Research and teaching expertise



A Career Pathway to the Financial Services

Professional Recognition

Fast-track to Certified Financial Planner (CFP) Certification

Graduates are eligible to apply for “Fast-track to Certified Financial Planner (CFP) Certification” – List C candidacy through The Institute of Financial Planners of Hong Kong (IFPHK). Under the fast-track arrangement, graduates will be exempted from taking the CFP certification education program (courses 1 to 3) and the CFP certification examination (foundation level).

Completion of “BUS6074 Comprehensive Practical Financial Planning” through the MA(PF) Programme will also lead to eligibility for exemption from “Course 4: Financial Planning Practice” of the CFP Certification Education requirements, fulfilling all the education requirements for CFP Certification.

Career Prospects

- Graduates are expected to pursue a career in financial services, including banking, securities, credit management, and private equity.
- The curriculums will also equip the participants for entering some trending financial fields such as private wealth management, fintech, green and sustainable finance, ESG consulting, etc.
- Graduates with strong research capacity could also pursue further studies or academic careers in finance or business studies.



Graduates' Employment

Graduates commonly enter careers in the following job functions.

Banking	Financial or Business Analysis	Insurance
Private Equity	Family Office Services	Public Sector
Securities	Professional Services (i.e. accounting, auditing, taxation)	Further Studies (Doctorate)

Graduates most often work in the following industries after completing the programme.



Business Services include accounting firm, law firm, advertising, consultancy, e-commerce etc.

Experiential Learning & Industrial Engagement

Engaging with the Industry and Alumni



Lecture on Family Legacy and Family Governance



Micro-module on Family Office Management



Alumni Development Forum: Reconnecting for a Personal Finance Future

Practice-oriented Activities



Greater Bay Area Accounting Case Competition



Personal Finance Ambassador Programme



Business Simulation Competition in Thailand

Community Participations: Promoting Financial Well-beings



Money Management Game Booth at EdUHK Alumni Homecoming Day



On-Campus Financial Literacy Talks Led by Students



Board Game on Lifelong Individual Financial Planning

Graduates' Reflections



Mr Gu — Graduate of 2022

Employed by a branch of a state-owned bank in Shenzhen, China

I chose to develop my career in mainland banking after graduation, attracted by the vast prospects of the mainland financial market. The programme's curriculum covers cutting-edge topics like ESG and sparked my interest in green finance, laying a solid foundation for my future career.



Mr Zhang — Graduate of 2023

Pursuing a PhD at Hong Kong Baptist University after graduation

The "Research Project" course provided rigorous academic training. It allowed me to experience the entire research process, from topic design to data analysis and presentation. This experience significantly improved my research skills and laid a strong foundation for my PhD applications.



Mr He — Graduate of 2024

Employed by a securities company in Hong Kong, China

Through elective internship course, I completed a three-month internship at The Bank of East Asia in Hong Kong, China, taking the role of a Customer Service Intern. It deepened my understanding of banking, improved my interpersonal skills, and provided me with an overview of the operation of a significant local bank.



Ms Li — Graduate of 2024

Serving in a state-owned cultural enterprise in Chinese Mainland.

The programme structure balances macro and micro perspectives, complemented by experiential learning opportunities like internships, Personal Finance Ambassador Programme, and developing a financial boarding game. These experiences enhanced my project management and teamwork skills, illustrating how personal finance and financial literacy impact people's daily life.



Mr Liu — Graduate of 2024

Serving at the Training Department of an insurance corporation in Hong Kong, China

As a student without finance background, studying in the programme was challenging yet rewarding. I gained deeper insights into the financial industry and experienced a unique learning environment. The comprehensive support for courses and internships helped me overcome disciplinary boundaries, laying my confidence to pursue a career in finance.



Mr Zhang — Graduate of 2024

Employed by a branch of a state-owned bank in Shenzhen, China

The Programme deepened my understanding of personal finance and investment. Practical opportunities like internships and community activities helped me apply the financial knowledge in real-life scenarios, broadened my perspective, and significantly enhanced my practical and problem-solving abilities.

Scholarship and Award Opportunities

Entrance Scholarship is available and awarded on the basis of academic merits with consideration of non-academic achievement.

Student Diversity Entrance Scholarships will be awarded to outstanding international full-time students.

The programme also offers a variety of exclusive scholarship and award opportunities to inspire students to pursue excellence in academics, professional development, global engagement, and leadership, such as the **Merit Award**, the **Leadership and Professional Achievement Award**, and the **Summer Exchange Programme Scholarship**.

Entrance Requirements

- a. Applicants should normally hold a recognised Bachelor's degree or other equivalent qualifications.
- b. Applicants whose entrance qualification is obtained from an institution in a non-English speaking system should normally fulfill one of the following minimum English proficiency requirements:
 - Overall score of IELTS 6.0 (academic version) (the test should be taken in test centres and the result should be valid within two years); or
 - TOEFL (internet-based test) #:
 - Score of 80 (for tests taken before 21 January 2026)
 - Score of 4.0 (for tests taken from 21 January 2026 onwards); or
 - Band 6 in the College English Test (CET) with a total score of 430 or above (the test result should be valid within two years); or
 - Grade C or above in GCSE / GCE OL English; or
 - Other equivalent qualifications.
- c. Shortlisted applicants may be required to attend an interview.

#The test should be taken in test centres, and the result should be valid within two years.

TOEFL Home Editions, TOEFL MyBest Score, IELTS Indicator, IELTS Online, IELTS One Skill Retake, Duolingo and National Postgraduate Entrance Examination (全國碩士研究生招生考試) are NOT acceptable.

For details, please visit: [https://www.eduhk.hk/acadprog/EnReq\(Pg\)/](https://www.eduhk.hk/acadprog/EnReq(Pg)/)

Tuition Fee

This programme is offered on a self-financed basis.

Please refer to the Programme Website for the latest tuition fee.

Apply Now

<https://www.eduhk.hk/acadprog/online>

Programme Enquiries

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Email: mapf@eduhk.hk

Website: <https://www.eduhk.hk/ssps/mapf>



Programme Website

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. Every effort has been made to ensure the accuracy of the information contained in this material. 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 material 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 material.

Remark: The Master of Arts in Personal Finance Education is retitled to Master of Arts in Personal Finance from 2027/28.