國立東華大學

教學計劃表 Syllabus

課程名稱(中文) Course Name in Chinese	理財入門AB			學年/學期 Academic Year/Semester	104/1
課程名稱(英文) Course Name in English	Introduction to Finance				
科目代碼 Course Code	GC__1790AB	系級 Department & Year	校核心	開課單位 Course-Offering Department	通識教育中心
修別 Type	選修 Elective	學分數/時間 Credit(s)/Hour(s)	2.0/2.0		
授課教師 Instructor	/李同龢				
先修課程 Prerequisite					

課程描述 Course Description

This class will introduce how to manage your personal finance. On the other hand, it will also increase student' s finance literacy.
How to manage your personal finance is very important these days. Poor personal finance management will have a dire consequence particularly when you are retired. Therefore, it is essential for everyone to understand the basic personal finance concept and how to manage them. This class intend to build a strong foundation for students to make a right decision in personal finance

課程目標 Course Objectives

介紹個人理財的基本觀念以及台灣目前已有之理財工具與市場

	(校)核心能力 Learning Outcomes	課程目標與校核心能力相關性 Correlation between Course Objectives and Basic Learning Outcomes
A	具備卓越之專業智能與終身學習的能力 Excellent professional knowledge and lifelong-learning abilities	●
B	具備康健自由、樸實敦厚的身心特質 Fair, honest, and robust qualities of healthy body and mind	
C	具備情意美感與創造思考的能力Affective aesthetic appreciation and creative thinking	
D	具備民主與法治之公民責任的能力 Civic engagement and responsibility in democratic society	
E	具備溝通合作與社會實踐的能力 Cooperative communication skills and social practices	●
F	具備在地關懷與全球視野 Domestic and global perspective	●
G	具備博雅多元的識見與人文素養 Diverse cultural understanding and humanistic values	
H	具備語文表達與資訊之統整應用的能力 A good command of languages and information arrangement	●

圖示說明Illustration ：● 高度相關 Highly correlated ○中度相關 Moderately correlated

授 課 進 度 表 Teaching Schedule & Content

週次Week	內容 Subject/Topics	備註Remarks
1	no class gets started	

2	Introduction: the financial planning process	
3	Diagnose your financial health and introduction to basic financial management tool: the time value of money	
4	No class, national holiday	
5	Tax planning and strategies and liquid assets management	
6	Credit card and your financ	
7	Consumer loans	
8	Mortgage and auto loan	
9	期中考試週 Midterm Exam	
10	Insurance – life and health	
11	Insurance – property and liability insurance	
12	Investments – basics and securities markets I	
13	Securities markets II and how to invest in stocks	
14	Understand Bonds and other alternative investments	
15	Mutual funds	
16	Retirement planning	
17	Estate planning	
18	期末考試週 Final Exam	

教 學 策 略 Teaching Strategies

☑ 課堂講授 Lecture ☐ 分組討論Group Discussion ☐ 參觀實習 Field Trip

☐ 其他Miscellaneous:

學期成績計算及多元評量方式 Grading & Assessments

配分項目 Items	配分比例 Percentage	多元評量方式 Assessments							
		測驗會考	實作觀察	口頭發表	專題研究	創作展演	卷宗評量	證照檢定	其他
平時成績 General Performance	20%		✓						
期中考成績 Midterm Exam	35%	✓							
期末考成績 Final Exam	35%	✓							
作業成績 Homework and/or Assignments	10%		✓						
其他 Miscellaneous (__________)									

評量方式補充說明
Grading & Assessments Supplemental instructions

教科書與參考書目（書名、作者、書局、代理商、說明） Textbook & Other References (Title, Author, Publisher, Agents, Remarks, etc.)
Textbook & Other References (Title, Author, Publisher, Agents, Remarks, etc.) Personal Finance Turning Money into Wealth, Arthur J. Keown, 6th edition, Pearson, 2013
課程教材網址（教師個人網址請列在本校內之網址） Teaching Aids & Teacher's Website (Personal website can be listed here.)
其他補充說明 (Supplemental instructions)