



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
修別 Type	選修 Elective	學分數/時間 Credit(s)/Hour(s)	2.0/2.0	
授課教師 Instructor	/李同穌			
先修課程 Prerequisite				
課程描述 Course Description				
<p>This class will introduce how to manage your personal finance. On the other hand, it will also increase student's finance literacy.</p> <p>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</p>				
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)