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②图玄束華大學

教學計劃表 Syllabus

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課程名稱(中文) Course Name in Chinese	理財入門AB				學年/學期 Academic Year/Semester			
課程名稱(英文) Course Name in English	Introduction to Finance							
科目代碼 Course Code	GC1790AB	系級 Department 校核心 & Year		開課單位 Course-Offering Department	通識教育中心			
修別 Type	選修 Elective	學分數/時 Credit(s)/Hou		2	2.0/2.0			
授課教師 Instructor	/李同龢							
先修課程 Prerequisite								
+# 44 Hr. Course Description								

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	•
В	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	
С	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	
Е	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	
Н	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 - pr	operty and li	ability	y insura	nce					
12	Investments -	basics and se	ecuritie	es marke	ets I					
13	Securities mark	ets II and ho	ow to in	nvest ir	stocks	S				
14	Understand Bonds and other alternative investments									
15	Mutual funds	Mutual funds								
16	Retirement planning									
17	Estate planning									
18	期末考試週 Fina	1 Exam								
		教	學策	略 Tea	aching	Strateg	ies			
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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)