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②图玄東華大學

教學計劃表 Syllabus

課程名稱(中文) Course Name in Chinese	理財入門AA				學年/學期 Academic Year/Semester			
課程名稱(英文) Course Name in English	Introduction	Introduction to Finance						
科目代碼 Course Code	GC1790AA	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			2.0/2.0			
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

Course Objectives 課程目標

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	自主學習與創新思考Autonomous Learning and Creative Thinking	•
В	康健身心Physical Fitness and Mental Balance	
С	互動、溝通與解決問題Interactive Communication and Problem Solving	•
D	情藝美感Artistic Feeling and Aesthetic Perception	
Е	文化素養與尊重差異Cultural Literacy and Respect for Differences	
F	在地關懷與公民責任Local Commitment and Civic Responsibility	0

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	Introduction				
2	The financial planning process				
	Diagnose your financial health and introduction to basic financial management tool: the time value of money				
4	Tax planning and strategies and liquid assets management				

5	No class, natio	nal holiday								
6	Credit card and your finance									
7	Consumer loans									
8	Mortgage and auto loan									
9	期中考試週 Midterm Exam									
10	Insurance - 1i	fe and health	1							
11	Insurance - pr	operty and li	ability	insura	ince					
12	Investments -	basics and se	ecuritie	es marke	ets I					
13	Securities mark	ets II and ho	ow to ir	nvest in	stocks	8				
14	Understand Bond	s and other a	ılternat	ive inv	estment	S				
15	Mutual funds									
16	No class									
17	Retirement plan	ning								
18	期末考試週 Final Exam									
		教	學策	略 Tea	aching (Strategi	.es			
✓ 課堂講	授 Lecture		分組討	論Group	Discus	sion	多	觀實習	Field T	rip
其他Miscellaneous:										
學期成績計算及多元評量方式 Grading & Assessments										
配分項目 配分比例 多元評量方式 Assessments										
	Items	Percentage	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 Ge Performance		20%		~						
期中考成績	Midterm Exam	40%	~							
期末考成績	Final Exam	40%	~							
作業成績 Ho Assignments	omework and/or									
其他 Miscellaneous ()										
		Grading & A		量方式を ents Sup			ruction	.S		
				Р	-					
	教科書與參考書目(書名、作者、書局、代理商、説明)									

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)