



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	106/1
課程名稱(英文) Course Name in English	Introduction to Finance			
科目代碼 Course Code	GC__1790AA	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	/李同蘇			
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	自主學習與創新思考Autonomous Learning and Creative Thinking			●
B	康健身心Physical Fitness and Mental Balance			
C	互動、溝通與解決問題Interactive Communication and Problem Solving			●
D	情藝美感Artistic Feeling and Aesthetic Perception			
E	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			○
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			
3	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, national 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 - 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	No class	
17	Retirement 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	40%	✓							
期末考成績 Final Exam	40%	✓							
作業成績 Homework and/or Assignments									
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)