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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	107/1
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	/李同穌				
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	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	Planning with Personal Financial Statements	
3	No class, national holiday	
4	the time value of money	

5	Using Tax Concepts for Planning	
6	Banking and Interest Rates	
7	Managing Your Money	
8	Assessing and Securing Your Credit	
9	期中考試週 Midterm Exam	
10	Managing Your Credit	
11	Personal Loans, Purchasing and Financing a Home	
12	Health, Disability Insurance, and Life Insurance	
13	Investing Fundamentals	
14	Investing in Stocks	
15	Investing in Bonds	
16	Investing in Mutual Funds and Asset Allocation	
17	No class, national holiday	
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:

教 學 創 新 自 評 Teaching Self-Evaluation

創新教學(Innovative Teaching)

☐ 問題導向學習(PBL) ☐ 團體合作學習(TBL) ☐ 解決導向學習(SBL)

☐ 翻轉教室 Flipped Classroom ☐ 磨課師 Moocs

社會責任(Social Responsibility)

☐ 在地實踐Community Practice ☐ 產學合作 Industy-Academia Cooperation

跨域合作(Transdisciplinary Projects)

☐ 跨界教學Transdisciplinary Teaching ☐ 跨院系教學Inter-collegiate Teaching

☐ 業師合授 Courses Co-taught with Industry Practitioners

其它 other: _____

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, Jeff Madura, 6th edition, Pearson, 2017

課程教材網址(含線上教學資訊,教師個人網址請列位於本校內之網址)
Teaching Aids & Teacher's Website(Including online teaching information. Personal website can be listed here.)

其他補充說明 (Supplemental instructions)