



## 教學計劃表 Syllabus

|                                    |                         |                             |                                 |                                    |
|------------------------------------|-------------------------|-----------------------------|---------------------------------|------------------------------------|
| 課程名稱(中文)<br>Course Name in Chinese | 理財入門AB                  |                             | 學年/學期<br>Academic Year/Semester | 107/1                              |
| 課程名稱(英文)<br>Course Name in English | Introduction to Finance |                             |                                 |                                    |
| 科目代碼<br>Course Code                | GC__1790AB              | 系級<br>Department & Year     | 校核心                             | 開課單位<br>Course-Offering Department |
| 修別<br>Type                         | 選修 Elective             | 學分數/時間<br>Credit(s)/Hour(s) | 2.0/2.0                         |                                    |
| 授課教師<br>Instructor                 | /李同蘇                    |                             |                                 |                                    |
| 先修課程<br>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<br>Learning Outcomes |   | 課程目標與校核心能力相關性<br>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 Industry-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:

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學期成績計算及多元評量方式 Grading & Assessments

| 配分項目<br>Items                       | 配分比例<br>Percentage | 多元評量方式 Assessments |          |          |          |          |          |          |    |
|-------------------------------------|--------------------|--------------------|----------|----------|----------|----------|----------|----------|----|
|                                     |                    | 測驗<br>會考           | 實作<br>觀察 | 口頭<br>發表 | 專題<br>研究 | 創作<br>展演 | 卷宗<br>評量 | 證照<br>檢定 | 其他 |
| 平時成績 General<br>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<br>Assignments |                    |                    |          |          |          |          |          |          |    |
| 其他 Miscellaneous<br>(_____)         |                    |                    |          |          |          |          |          |          |    |

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)