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②图玄東華大學

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								
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	•
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	
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	Credit card and your finance					
6	Consumer loans					
7	Mortgage and auto loan					
8	Insurance - life and health					
9	期中考試週 Midterm Exam					
10	Insurance - property and liability insurance					
11	Investments - basics and securities markets I					
12	Securities markets II and how to invest in stocks					
13	Understand Bonds and other alternative investments					
14	Mutual funds					
15	Retirement planning					
16	Estate planning					
17	Fitting the pieces together					
18	期末考試週 Final Exam					
	教學策略 Teaching Strategies					
✓ 課堂講	授 Lecture					
其他Mis	scellaneous:					
	教學創新自評 Teaching Self-Evaluation					
創新教學(Innovative Teaching)					
問題導向學習(PBL) ■ ■體合作學習(TBL) 解決導向學習(SBL)						
■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■						
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 othe:	r:					

學期成績計算及多元評量方式 Grading & Assessments									
配分項目	多元評量方式 Assessments								
Items	配分比例 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 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、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(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)