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## ②图玄東華大學

# 教學計劃表 Syllabus

| 4 - 4 1 - 4 1 - 4 1 - 4 1          |                         |                                |  |                                       |                                 |  |  |  |
|------------------------------------|-------------------------|--------------------------------|--|---------------------------------------|---------------------------------|--|--|--|
| 課程名稱(中文)<br>Course Name in Chinese | 理財入門AB                  |                                |  |                                       | 學年/學期<br>Academic Year/Semester |  |  |  |
| 課程名稱(英文)<br>Course Name in English | Introduction to Finance |                                |  |                                       |                                 |  |  |  |
| 科目代碼<br>Course Code                | GC1790AB                | 系級<br>Department 校核心<br>& Year |  | 開課單位<br>Course-Offering<br>Department | 通識教育中心                          |  |  |  |
| 修別<br>Type                         | 選修 Elective             | 學分數/時<br>Credit(s)/Hou         |  | 2                                     | 2.0/2.0                         |  |  |  |
| 授課教師<br>Instructor                 | /李同龢                    |                                |  |                                       |                                 |  |  |  |
| 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<br>力相關性<br>Correlation between<br>Course Objectives<br>and Basic Learning<br>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) ■ 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 othe:  | r:   |  |  |  |  |  |

| 學期成績計算及多元評量方式 Grading & Assessments                      |                    |                    |          |          |          |          |          |          |    |
|--|--------------------|--------------------|----------|----------|----------|----------|----------|----------|----|
| 配分項目   | 配分比例<br>Percentage | 多元評量方式 Assessments |          |          |          |          |          |          |    |
| Items  |                    | 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(含出缺席)<br>General Performance<br>(Attendance Record) | 20%                |                    | <b>✓</b> |          |          |          |          |          |    |
| 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   |                    |                    |          |          |          |          |          |          |    |

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(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)