朝陽科技大學 095學年度第1學期教學大綱
Personal Financial Planning 個人財務規劃

當期課號	1268	Course Number	1268
授課教師	嚴宗銘	Instructor	YAN,TUNG MING
中文課名	個人財務規劃	Course Name	Personal Financial Planning
開課單位	保險金融管理系(四日)四A	Department	
修習別	選修	Required/Elective	Elective
學分數	2	Credits	2
課程目標	1. 讓同學同時具備投資知能，人生各階段的理財需求並能應用稅務規劃來達成人生財富大計 2. 金融資訊之蒐集與金融工具之使用，透過虛擬投資情境讓學生得到實務的投資技能 3. 金融工具之風險程度與法律規範的充分告知及正面積極的理財觀念 4. 藉由金融大海嘯的慘痛教訓教導正確的理財規劃	Objectives	1. Enabling students to have investment knowledge to master financial management needs in different stages and use tax planning to achive the wealth plan in life. 2. Collection of financial information and use of financial tools, virtual investment scenerio trains students to have practical investment skills. 3. Full notification of financial tool risk level and legal regulations; positive and aggressive financial management concept. 4. Teaching accurate financial planning from the painful lessons of financial crisis.
教材	(1)"Fundamentals of Investments", 2nd Ed., Charles J. Corrado and Bradford D. Jordan, McGraw Hill. 2002. (2)"投資學-理論與實務",王仲偉,黃振原,楊宗明,潘俐霖,2002. (3)自編教材 (4)論文	Teaching Materials	Fundamentals of Investments", 2nd Ed., Charles J. Corrado and Bradford D. Jordan, McGraw Hill. 2002.
成績評量方式	平常考 25% 期中考 25% 期末考 25% 出席率 25%	Grading	class performance 25% mid-term exam 25% final exam 25% present rate 25%
教師網頁	_		
教學內容	(一)投資學概論 (二)股票市場 (三)利率與債券市場 (四)選擇權與期貨 (五)資產管理 (六)全方位理財 (七)實務應用	Syllabus	Part One Introduction Part Two Stock Markets Part Three Interest Rates and Bond Markets Part Four Optoins and Futures Part Five Protforlio Management

尊重智慧財產權，請勿非法影印。