

**朝陽科技大學 095學年度第2學期教學大綱**  
**Special Topics of Pension Planning 退休金專題**

<b>當期課號</b>	7079	<b>Course Number</b>	7079
<b>授課教師</b>	康裕民	<b>Instructor</b>	
<b>中文課名</b>	退休金專題	<b>Course Name</b>	Special Topics of Pension Planning
<b>開課單位</b>	保險金融管理系碩士班二A	<b>Department</b>	
<b>修習別</b>	選修	<b>Required/Elective</b>	Elective
<b>學分數</b>	3	<b>Credits</b>	3
<b>課程目標</b>	<p>本課程介紹退休金制度的基本觀念，使同學知道如何在未來做好退休財務規劃</p> <ol style="list-style-type: none"> <li>1. 建立學生退休金計劃的基本觀念</li> <li>2. 使學生了解我國勞工退休金制度</li> <li>3. 使學生了解國民年金制度</li> <li>4. 讓學生知道如何在未來做好財務規劃符合退休需求</li> </ol>	<b>Objectives</b>	<p>The course introduces the basic concept of pension system to enable students to know how to make retirement financial planning in the future.</p> <ol style="list-style-type: none"> <li>1. Establishing students' basic concept on pension planning.</li> <li>2. Enabling students to understand labor pension system in Taiwan.</li> <li>3. Enabling students to understand national pension system.</li> <li>4. Enabling students to know to make appropriate financial planning to meet retirement demand.</li> </ol>
<b>教材</b>	<p>書名:Pension Planning Pension, Profit-Sharing, and Other Deferred Compensation Plans 作者:Allen Melone Rosenbloom VanDerhei 出版社:McGraw Hill</p>	<b>Teaching Materials</b>	<p>Pension Planning Pension, Profit-Sharing, and Other Deferred Compensation Plans by Allen Melone Rosenbloom VanDerhei(McGraw Hill)</p>
<b>成績評量方式</b>	以口頭報告的台風、內容熟悉度、投影片製作、互相討論及回答問題的反應能力為成績評量方式	<b>Grading</b>	<p>Mid Term Exam 30% Final 30% Oral report grading 40%</p>
<b>教師網頁</b>	-		
<b>教學內容</b>	<p>深入研究退休金計劃之發展、為何準備退休金原因、退休金之定義、稅及法律之規定內容，介紹確定提撥計劃、確定給付計劃與其他計劃，以及投資、經營管理與課稅等主題。</p>	<b>Syllabus</b>	<p>This course aims at presenting the main ideas of pension plans、environmental influences on private pension plans、Tax and legal requirements、Defined contribution plans、Defined Benefit plans and Other plans、Investing, Administration, and Taxation.</p>

尊重智慧財產權，請勿非法影印。