朝陽科技大學 096學年度第1學期教學大綱
Personal Financial Planning 個人財務規劃

當期課號	3211	**Course Number**	3211
授課教師	吳志松	**Instructor**	WU,CHIH SUNG
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(四進)五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	自編講義，金融機構參訪及金融工具模擬操作	**Teaching Materials**	From edits the printed lecture
成績評量方式	1.期中考：30% 2.期末考：30% 3.平常討論：40% 4.金融證照：加分	**Grading**	1.Midterm：30% 2.Final report：30% 3.Discuss：40%
教師網頁	_		
教學內容	本課程重點介紹現代投資理論及工具以應用在台灣股市，並納入稅務規劃概念(如兩稅合一、贈與稅、遺產稅)，期讓同學同時具備投資知能，並能應用稅務規劃來達成人生財富大計。	**Syllabus**	The contents of this course will focus on the introduction of investment theory and tools to apply on the Taiwan Stock Market. Also, the tax planning will be another key-point. The aim of this course is to help students to use all investment knowledge and good tax planning to achieve their lifetime investment goals.