

朝陽科技大學 099學年度第1學期教學大綱
Personal Financial Planning 個人財務規劃

當期課號	3131	Course Number	3131
授課教師	林宏誠	Instructor	LIN,HUNG CHENG
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)四A	Department	
修習別	選修	Required/Elective	Elective
學分數	2	Credits	2
課程目標	<ol style="list-style-type: none"> 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	<ol style="list-style-type: none"> 1. Enabling students to have investment knowledge to master financial management needs in different stages and use tax planning to achieve 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	鄭義，財富管理 理論與實務(投資組合)，新陸書局，民98年	Teaching Materials	Book : Wealth Management
成績評量方式	<ol style="list-style-type: none"> 1.期中考試 30% 2.期末考試 30% 3.課堂表現 40% 	Grading	<ol style="list-style-type: none"> 1.Middle term exam. 30% 2.Final exam. 30% 3.Class performance 40%
教師網頁	-		
教學內容	<ol style="list-style-type: none"> 1.以個人財務管理的觀點講授財務規劃及投資策略的關係。 2.透過案例講解達到理論與實務之融會貫通。 3.藉由個案研究與群體討論方式,增進學習效果。 	Syllabus	<ol style="list-style-type: none"> 1.To explain the relationship between financial planning and investment strategy by personal financial management. 2.Achieves the theory and the practice achieving mastery through a comprehensive study of by the case explanation. 3.Discusses the way because of the case study with the community to promote the study effect.

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