

National Chengchi University

Course "Wealth Management and Financial Planning"

Course Number: 300852001

Prof.: Timothy J Jiang (aka Jiann-kuo Jiang)

Date: Dec. 10, 2014

Course Objective:

The goals of this course are to provide students with knowledge of:

- Wealth Management and Applications
- Investment Building Blocks – Stocks and Bonds
- Portfolio Theory, Risk, and Risk Management
- Investor Behavior, Behavior Finance and Life Cycle
- Investment and Insurance Companies and Investment Products

Course Description:

The purpose of this course is to illustrate the beauty and simplicity of modern financial theory and the benefits of its application at the personal level. This class will treat wealth as a kind of precious resource, and as such, we will discuss how to be maximally efficient with managing this resource. This class will trace of development of modern financial theories through history; and the contributions of five Nobel Prize winners – Tjalling Koopmans, Harry Max Markowitz, Eugene Fama, Daniel Kahneman and Robert J. Shiller. At the end of this course, all students will understand the meaning of wealth management and be wise financial decision makers.

Grading Standard

40% Final Exam

30% Case Presentation

30% Attendance

Year 2015, Spring Semester

Week	Date	Topic
1	3/2	Overview of Wealth Management and Financial Process
2	3/9	Wealth Accumulation, Planning and Investing
3	3/16	Personal Finances - Approach Optimization
4	3/23	Knowing the Basics: Stock and Bond
5	13/30	Investment Overview - Risk and Return
6	4/6	Risk Management and Diversification
7	4/13	Modern Portfolio Theory
8	4/20	Efficient Market Hypotheses
9	4/27	Behavioral Finance
10	5/4	Behavioral Finances vs. Efficient Market Hypothesis
11	5/11	Financial Quantity vs. Quality
12	5/18	Insurance, theory and Application
13	5/25	Extended Holiday (Univ. Anniversary Celebration)
14	6/1	Investments Company - Mutual Fund, ETF and Target-Date-Fund
15	6/8	Options, Futures, Structured Note, Hedge Funds and other Package Products
16	6/15	Financial Regulatory and Surveillance
17	6/22	Financial Market Review
18	6/29	Final Exam