105-1 學年度 商 學院 英語授課課程大綱

課程名稱 Course Title	(中文) 資產管理與財務規劃 (英文) Wealth Management and Financial Planning
課程目標 Course Objectives	The goals of this course are to provide students with knowledge of: ealth Management and Applications Investment Building Blocks – Stocks and Bond Portfolio Theory, Risk, and Risk Management Investor Behavior, Behavior Finance and Life Cycle Investment and Insurance Companies and Investment Products
課程大綱 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 – Tjailling 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.
上課進度 Weekly Course Schedule	Week Date Topic 1 Overview of Wealth Management and Financial Process 2 Wealth Accumulation, Planning and Investing 3 Personal Finances - Approach Optimization 4 Knowing the Basics: Stock and Bond 5 Investment Overview - Risk and Return 6 Risk Management and Diversification 7 Modern Portfolio Theory 8 Efficient Market Hypotheses 9 Behavioral Finance 10 Behavioral Finances vs. Efficient Market Hypothesis 11 Financial Quantity vs. Quality 12 Insurance, theory and Application 13 Extended Holiday (Univ. Anniversary Celebration) 14 Investments Company - Mutual Fund, ETF and Target-Date-Fund 15 Options, Futures, Structured Note, Hedge Funds and other Package Products 16 Financial Regulatory and Surveillance 17 Financial Market Review 18 Final Exam
教學方式 Instructional Method	Lecture
課程要求 Course Requirements	
評量方式 Evaluation	40% Final Exam 30% Case Presentation 30% Attendence

教材及參考書目 Textbooks & Suggested Materials	
課程相關 連結網址 Course Website	
備註 Remarks	None

申請教師簽章：國際企業管理英語碩士學位學程(IMBA) 陳春龍 學程主任 (代)　開課單位主管簽章：國際企業管理英語碩士學位學程(IMBA) 陳春龍 學程主任