南華大學新開課程申請表(含中英文課程概述)

開課學年學期：102 學年第 2 學期
開課系所：**財務金融學系**(碩士班/研究所)
修業別：■大學日間部 □進修學士班 □碩士班 □碩士專班 □博士班
科目代號：□□□□-□□□□□(課務組提供) 必選修別：□必修 ■選修
學分：______學分 授課時數(週)：______ 開課年級：_____ 年級
通識學門分類(非通識課程免填)：__________________
中文科目名稱(12 中文字以內)：個人財富管理
英文科目名稱(60 字以內)：Personal Wealth Management

中文概述 Course summary (Chinese)

面對低薪資高通膨的時代來臨，如何聰明理財與簡單投資，已是現今不可或缺的基本專業，輕鬆學習正確而有效的投資理財實務，幫助您掌握財富增值、抵抗職場低潮、做好退休規劃、享受品味人生！**財富管理要做好六個方面的規劃，一是現金規劃，二是風險管理規劃，三是投資規劃，四是稅收規劃，五是養老規劃，六是財產分配與傳承規劃**;在財富管理方面，有重要三原則：安全性、流動性和收益性。主要授課規劃為九大單元，說明如下

1. **理財規劃與投資實務入門**
2. **投資理財實戰—股票篇**
3. **投資理財實戰—基金篇**
4. **投資理財實戰—保險篇**
5. **投資理財實戰—不動產篇**
6. **看懂財富的景氣循環，掌握全球財富重分配**
7. **如何建立投資管道、篩選理專為財富實質加分**
8. **投資管理三要訣－投資金字塔**
9. **如何做好個人財富管理—理財規劃實作**

英文概述 Course summary (English)

How to face the low-wage high inflation era, and how to do clever and simple financial investment, is now an integral part of basic professional issue to learn. This course is easy to learn the correct and effective investment and financial management knowledge and provide some case studies to help you how to master your wealth, career low resistance, good retirement planning. The purpose in learning this course is enjoying the taste of life. Six aspects of wealth management are described as follows.

1 Introduction to Financial Planning and Investment Practices
2 Investment practices - stock articles
3 Investment practices - fund articles
4 Investment practices - Insurance articles
5 Investment practices - Real estate articles
6 Understanding the wealth of the business cycle, to grasp the global redistribution of wealth
7 How to create investment pipeline, screening for wealth management
8 Three key tips of Investment Management - Investment Pyramid
9 How to do personal wealth management plan - Financial Planning Implementation