

Tamkang University Academic Year 113, 1st Semester Course Syllabus

Course Title	WEALTH MANAGEMENT	Instructor	I-TING LU
Course Class	TLBAB3A DEPARTMENT OF BANKING AND FINANCE DIVISION OF GLOBAL FINANCIAL MANAGEMENT (ENGLISH-TAUGHT PROGRAM),	Details	<ul style="list-style-type: none"> ◆ Blended Course ◆ Selective ◆ One Semester ◆ 3 Credits
Relevance to SDGs	3A SDG3 Good health and well-being for people SDG4 Quality education SDG10 Reducing inequalities		
Departmental Aim of Education			
I. Learning and instanding international financial theory. II. Learn to plan the future. III. Enhance the ability of practical analysis. IV. Increase the team research ability. V. Master the international financial pulsation. VI. Cultivate morality and global civilization.			
Subject Departmental core competences			
A. The student to have a basic knowledge of international financial management theory and practice.(ratio:30.00) B. To have a good grounding of relevant financial laws.(ratio:15.00) C. To understand the basic moral principles within the international financial industry. (ratio:5.00) D. To have a global perspective of the subject and a basic command of foreign language abilities.(ratio:20.00) E. To obtain international professional qualifications that will aid their future career. (ratio:20.00) F. To obtain a basic ability to examine domestic and global financial situations.(ratio:10.00)			
Subject Schoolwide essential virtues			
1. A global perspective. (ratio:10.00) 2. Information literacy. (ratio:10.00) 3. A vision for the future. (ratio:5.00)			

4. Moral integrity. (ratio:20.00)
5. Independent thinking. (ratio:20.00)
6. A cheerful attitude and healthy lifestyle. (ratio:5.00)
7. A spirit of teamwork and dedication. (ratio:20.00)
8. A sense of aesthetic appreciation. (ratio:10.00)

Course Introduction

The wealth management investment process can be organized into four general, integrated categories: client relationship, client profile, wealth investment policy, portfolio management, monitoring, and market review. The main theme of this course is to discuss the process and interrelationship of these categories.

The correspondences between the course's instructional objectives and the cognitive, affective, and psychomotor objectives.

Differentiate the various objective methods among the cognitive, affective and psychomotor domains of the course's instructional objectives.

- I. Cognitive : Emphasis upon the study of various kinds of knowledge in the cognition of the course's veracity, conception, procedures, outcomes, etc.
- II.Affective : Emphasis upon the study of various kinds of knowledge in the course's appeal, morals, attitude, conviction, values, etc.
- III.Psychomotor: Emphasis upon the study of the course's physical activity and technical manipulation.

No.	Teaching Objectives	objective methods
1	Understanding the concept and process of wealth management	Cognitive

The correspondences of teaching objectives : core competences, essential virtues, teaching methods, and assessment

No.	Core Competences	Essential Virtues	Teaching Methods	Assessment
1	ABCDEF	12345678	Lecture, Discussion	Testing, Study Assignments, Report(including oral and written), Activity Participation

Course Schedule

Note for Blended Course : When utilizing weekly digital instruction, please fill in "Online Asynchronous Instruction".

Week	Date	Course Contents	Note

1	113/09/09 ~ 113/09/15	Introduction	
2	113/09/16 ~ 113/09/22	NO CLASS	
3	113/09/23 ~ 113/09/29	Lecture _ market of WM industry and Group Presentation	
4	113/09/30 ~ 113/10/06	Lecture _ clients of WM industry	Online Asynchronous Instruction
5	113/10/07 ~ 113/10/13	Lecture _ clients of WM industry and Group Presentation	
6	113/10/14 ~ 113/10/20	Lecture _ offerings of WM industry	Online Asynchronous Instruction
7	113/10/21 ~ 113/10/27	Lecture _ offerings of WM industry and Group Presentation	
8	113/10/28 ~ 113/11/03	Lecture _ players of WM industry	Online Asynchronous Instruction
9	113/11/04 ~ 113/11/10	Midterm Exam	
10	113/11/11 ~ 113/11/17	Lecture _ saving and investment and risk tolerance	Online Asynchronous Instruction
11	113/11/18 ~ 113/11/24	Investment planning and Group Presentation	
12	113/11/25 ~ 113/12/01	Insurance planning and Group Presentation	
13	113/12/02 ~ 113/12/08	Retirement planning and Group Presentation	
14	113/12/09 ~ 113/12/15	Retirement planning and Group Presentation	
15	113/12/16 ~ 113/12/22	Retirement Needs Analysis and Group Presentation	
16	113/12/23 ~ 113/12/29	Group presentation	
17	113/12/30 ~ 114/01/05	Final Exam	
18	114/01/06 ~ 114/01/12	Flexible Teaching Week: Class via Msteams	
Key capabilities			
Interdisciplinary			

Distinctive teaching	
Course Content	Gender Equality Education Logical Thinking
Requirement	
Textbooks and Teaching Materials	Self-made teaching materials:Handouts, Worksheets
References	
Grading Policy	<p>◆ Attendance : 10.0 % ◆ Mark of Usual : % ◆ Midterm Exam : 20.0 %</p> <p>◆ Final Exam : 30.0 %</p> <p>◆ Other (oral presentation) : 40.0 %</p>
Note	<p>1. This syllabus may be uploaded at the website of the Course Syllabus Management System at https://info.ais.tku.edu.tw/csp or through the link of the Course Syllabus Upload posted on the home page of the TKU Office of Academic Affairs http://www.acad.tku.edu.tw/CS/main.php</p> <p>2. According to the Implementation regulations of distance education for junior college and above are prescribed pursuant to Article 2, "The distance learning course referred to in these Measures refers to more than one-half of the teaching hours in each subject."</p> <p>3. According to the regulations of Tamkang University Enforcement Rules for digital teaching, Paragraph 2 and Article 3, the distance learning course of our school must be "The course of digital teaching with distance learning platform or synchronous video system in our school. Teaching Hours include course lectures, teacher-student interaction discussions, quizzes and other learning activities."</p> <p>4. If there are any temporary course changes (including time changes and classroom changes of distance learning courses, blended courses), please make out an application according to regulations to the Office of Academic Affairs.</p> <p>※ Unauthorized photocopying is illegal. Using original textbooks is advised. It is a crime to improperly photocopy others' publications.</p>