

## Tamkang University Academic Year 114, 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	♦ General Course ♦ Selective ♦ One Semester ♦ 3 Credits
Relevance to SDGs	3A SDG3 Good health and well-being for people SDG4 Quality education SDG10 Reducing inequalities		
D e p a r t m e n t a l   A i m   o f   E d u c a t i o n			
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.		
<p><b>The correspondences between the course's instructional objectives and the cognitive, affective, and psychomotor objectives.</b></p> <p>Differentiate the various objective methods among the cognitive, affective and psychomotor domains of the course's instructional objectives.</p> <p>I. Cognitive : Emphasis upon the study of various kinds of knowledge in the cognition of the course's veracity, conception, procedures, outcomes, etc.</p> <p>II.Affective : Emphasis upon the study of various kinds of knowledge in the course's appeal, morals, attitude, conviction, values, etc.</p> <p>III.Psychomotor: Emphasis upon the study of the course's physical activity and technical manipulation.</p>				
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, Discussion(including classroom and online), Report(including oral and written), Activity Participation
Course Schedule				
Week	Date	Course Contents		Note

1	114/09/15 ~ 114/09/21	Introduction	
2	114/09/22 ~ 114/09/28	Lecture _ saving and investment and risk tolerance	
3	114/09/29 ~ 114/10/05	Investment planning	
4	114/10/06 ~ 114/10/12	No Class (Holiday)	
5	114/10/13 ~ 114/10/19	Insurance planning and Group Presentation	
6	114/10/20 ~ 114/10/26	No Class (Holiday)	
7	114/10/27 ~ 114/11/02	Retirement planning and Group Presentation	
8	114/11/03 ~ 114/11/09	Retirement planning and Group Presentation	
9	114/11/10 ~ 114/11/16	Retirement Needs Analysis and Group Presentation	
10	114/11/17 ~ 114/11/23	Review Class of Midterm Exam and Group Presentation	
11	114/11/24 ~ 114/11/30	Midterm Exam	
12	114/12/01 ~ 114/12/07	Lecture _ market of WM industry and Group Presentation	
13	114/12/08 ~ 114/12/14	Lecture _ clients of WM industry and Group Presentation	
14	114/12/15 ~ 114/12/21	Lecture _ offerings of WM industry and Group Presentation	
15	114/12/22 ~ 114/12/28	Lecture _ players of WM industry and Group Presentation	
16	114/12/29 ~ 115/01/04	Final Exam	
17	115/01/05 ~ 115/01/11	Group Presentation	
18	115/01/12 ~ 115/01/18	Group Presentation	
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 : 10.0 %    ◆ Midterm Exam : 20.0 %</p> <p>◆ Final Exam : 20.0 %</p> <p>◆ Other (oral presentation) : 40.0 %</p>
Note	<p>This syllabus may be uploaded at the website of Course Syllabus Management System at <a href="https://web2.ais.tku.edu.tw/csp">https://web2.ais.tku.edu.tw/csp</a> or through the link of Course Syllabus Upload posted on the home page of TKU Office of Academic Affairs at <a href="http://www.acad.tku.edu.tw/CS/main.php">http://www.acad.tku.edu.tw/CS/main.php</a>.</p> <p>※"Adhere to the concept of intellectual property rights" and "Do not illegally photocopy, download, or distribute." Using original textbooks is advised. It is a crime to improperly photocopy others' publications.</p>