The Institute of International Management is dedicated to provide quality teaching and research environment enabling students with broad and integrated knowledge of management in preparation for successful careers in business, government agencies or academic institutions.

General Program Learning Goals (goals covered by this course are indicated):

- Graduates should be able to communicate effectively verbally and in writing.
- Graduates should solve strategic problems with a creative and innovative approach.
- Graduates should demonstrate leadership skills demanded of a person in authority.
- Graduates should possess a global economic and management perspective.
- Graduates should possess the necessary skills and values demanded of a true professional.

Instructor: Dr. Ann Shewing Yang
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Course Objectives:
This course aims to introduce the importance of planning and have a basic understanding of planning techniques in Finance for decision making. Discussion topics include the importance of financial planning, time value of money, financial statements and budgets, and cash management. Accompanying class lectures, substantial effort is expected from students to participate in academic reading and writing of topics related to course content. Students participating in this class are required to complete a term paper or presentation with written material / document. Upon completion of this course, students will gain not only essential knowledge on financial planning, but also the importance of decision making in assets.

Instruction Materials:
- Reference material: Academic research paper presentation and reading – details will be given in class

Grading Policy*: Students are evaluated in areas of class participation (include oral presentations/homework/assignments)(30%), midterm exam (35%), and final exam (35%).

Class Meeting Schedule:

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<th>Topics of Discussion</th>
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<td>Consumer Durables</td>
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<td>The Time Value of Money</td>
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<td>Financial Statements and Budgets</td>
<td>Retirement Planning</td>
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<td>Taxes</td>
<td>Brief discussions on insurance – property / liability insurance, health care / disability insurance / life insurance and estate planning</td>
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<td>Cash Management</td>
<td>Brief discussions on investing – markets and institutions / investment basics / stocks and bonds / mutual funds and other pooling arrangements</td>
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<td>Short-Term Credit Management</td>
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