

PROGRAM: Financial Services

**PROGRAM
CIP CODE:** 52.0800.00

DESCRIPTION: The **Financial Services** instructional program prepares students to provide a wide variety of customer services and technical support in investments and securities, financial planning, credit management, insurance, real estate and banking and other financial related areas. Development of leadership skills is integral to the students' success in the program. Students who complete this program will be prepared to participate in teams to solve problems and think critically about managing their personal finances and those of a business organization. An integrated approach to teaching and learning is recommended as students develop interpersonal relations, career development skills, Workplace Employability Skills and technical knowledge and skills. Students completing this program will be prepared to enter the workforce and/or Post-secondary where they will be able to apply the skills necessary to be in Financial Services. The program is designed and delivered as a coherent sequence of school-based and work-based supervised learning. Students learn leadership skills and develop their leadership abilities through participation in the state-recognized Career and Technical Student Organization, FBLA (Future Business Leaders of America).

RECOMMENDED PROGRAM SEQUENCE OF COURSES:

Career Preparation

The following describes the recommended sequence of courses developed from industry-validated skills necessary for initial employment continued or continued related education. All Career Preparation state-designated Financial Services standards are addressed in the instructional sequence.

Schools with ADE approved Financial Services programs will utilize all of the industry-validated state standards and measurement criteria for this program in the design and delivery of the following recommended sequence of courses.

52.0800.10 **Introduction to Business and Financial Services:** Students enrolled in this course will receive instruction in a variety of customer services provided by banks, insurance agencies, investment brokers, credit unions and related enterprises. General knowledge of budgeting and credit management are outcomes of this course. A computer with business applications software is used by students to perform business and finance related tasks.

-and-

52.0800.20 **Advanced Financial Services:** Students enrolled in this course will receive instruction in principles of economics and accounting, financial instruments, economic and monetary systems. The outcomes of this course are integrated into learning experiences allowing students to demonstrate their knowledge and skills in the full range of Financial Services State standards through projects and simulations. A computer with business applications software is used by students to perform basic financial management tasks.

And program may elect to add:

52.0800.75 **Financial Services - Internship:** This course provides students an opportunity to apply previously developed financial services knowledge and skills while participating in a structured work experience. Students may be paid or unpaid for their work experience.

-or-

52.0800.80 **Financial Services - Cooperative Education:** This course is designed to provide students with both school-based and work-based learning. Training plans and training agreements are based on previously developed financial services knowledge and skills. Students generally work a minimum of 15 hours a week.

TEACHER CERTIFICATION REQUIREMENTS FOR THE FINANCIAL SERVICES PROGRAM

CAREER PREPARATION: The instructor must be CTE certified according to the following table

Financial Services	CERTIFICATES
	Types: PCTBM, SCTBM
Note:	
<ul style="list-style-type: none"> ▪ Financial Services, 52.0800.70 may be a part of the sequence and the teacher must hold a Cooperative Education Endorsement (CEN). ▪ Teacher/Coordinator 52.0800.75 is not required to have a Cooperative Education Endorsement (CEN). ▪ Teacher/Coordinator 52.0800.80 is required to have a Cooperative Education Endorsement (CEN). 	

CERTIFICATE ABBREVIATIONS FOR THE FINANCIAL SERVICES PROGRAM

Certificate Types	
PCTBM	Provisional Career and Technical Education Business and Marketing
SCTBM	Standard Career and Technical Education Business and Marketing