# Advanced Finance Workplace Experience Course No. 33200 Credit: 1.0

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| --- | --- | --- | --- |
| **Student name:** |  | **Graduation Date:** |  |

Pathways and CIP Codes:Finance (52.0801)

Course Description: **Application Level:** Advanced Finance Workplace Experience is a course which expands on the knowledge and skills a student has learned throughout the entire pathway of courses and provides a second level of application in the industry.

Directions:The following competencies are required for full approval of this course. Check the appropriate number to indicate the level of competency reached for learner evaluation.

**RATING SCALE:**

4. Exemplary Achievement: Student possesses outstanding knowledge, skills or professional attitude.

3. Proficient Achievement:Student demonstrates good knowledge, skills or professional attitude. Requires limited supervision.

2. Limited Achievement:Student demonstrates fragmented knowledge, skills or professional attitude. Requires close supervision.

1. Inadequate Achievement:Student lacks knowledge, skills or professional attitude.

0. No Instruction/Training:Student has not received instruction or training in this area.

## Benchmark 1: Interpersonal Skills: Examine and employ interpersonal skills in making informed decisions to continue business operations.

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 1.1 | Demonstrate the ability to build successful relationships with customers |  |
| 1.2 | Participates in development programs, civic meetings, conferences, functions, industry trade associations, and other community based programs. |  |
| 1.3 | Develops and maintains professional working relationships. |  |

## Benchmark 2: Communication: Demonstrate use of the concepts, strategies, and systems for obtaining and conveying ideas and information to enhance communication in the workplace. communication in the workplace.

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Apply verbal skills when obtaining and conveying information. |  |

## Benchmark 3: Communication: Use correct grammar, punctuation and terminology to write and edit documents.

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 3.1 | Compose internal and external multi-paragraph documents clearly, succinctly, and accurately to convey and obtain information effectively. |  |

## Benchmark 4: Communication: Develop and deliver formal and informal presentations using appropriate media to engage and inform audiences.

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 4.1 | Develop and deliver oral presentations to provide information for specific purposes. |  |

## Benchmark 5: Professional Knowledge: Demonstrate professional skill and/or knowledge in areas of the finance industry.

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 5.1 | Demonstrate knowledge of the understanding of the movement of money. |  |
| 5.2 | Analyze federal, state and local government regulations related to the financial industry. |  |
| 5.3 | Apply concepts related to risk analysis, debt management and investment analysis. |  |

## Benchmark 6: Professional Knowledge: Identify regulatory agencies and regulatory legislation.

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 6.1 | Apply concepts applicable to state and federal programs and/or, regulations relating to investor owned public and/or private entities |  |
| 6.2 | Connect laws, regulations, practices and concepts of applicable financial business and/or program area. |  |

## Benchmark 7: Technical Skills: Demonstrate technical knowledge and skills.

### Competencies

| **#** | **Description** | **RATING** |
| --- | --- | --- |
| 7.1 | Utilize knowledge and skills to perform job duties to industry standards. |  |

## Benchmark 8: Technical Skills: Demonstrate high aptitude for financial reporting.

### Competencies

| **#** | **Description** | **RATING** |
| --- | --- | --- |
| 8.1 | Implement lateral thinking. |  |
| 8.2 | Implement the ability to analyze scenarios and draw suitable conclusions. |  |
| 8.3 | Demonstrate knowledge and proficiency in predictive analytics, accounts payable automation, and accounting software. |  |

## Benchmark 9: Problem Solving and Decision Making: Assess the financial implication of a complicated business structure.

### Competencies

| **#** | **Description** | **Rating** |
| --- | --- | --- |
| 9.1 | Develop personalized solutions for a client. |  |

## Benchmark 10: Problem Solving and Decision Making: Connect and analyze information for sound decision making.

### Competencies

| **#** | **Description** | **rating** |
| --- | --- | --- |
| 10.1 | Gather, organize, summarize and analyze data within prescribed timeframes. |  |
| 10.2 | Analyze business operations, regulatory filings and/or financial statements. |  |
| 10.3 | Determine compliance with laws and regulations and draw conclusions. |  |
| 10.4 | Review, examine and prepare documents and projections. |  |
| 10.5 | Recommend corrective action when necessary based on acquired knowledge and observation of best practices in the industry while maintaining confidentiality. |  |

## Benchmark 11: Information Technology Applications: Employ technological tools to expedite workflow.

### Competencies

| **#** | **Description** | **Rating** |
| --- | --- | --- |
| 11.1 | Use information technology tools to manage and perform work responsibilities. |  |

## Benchmark 12: Information Technology Applications: Operate writing and publishing applications to prepare business communications.

### Competencies

| **#** | **Description** | **Rating** |
| --- | --- | --- |
| 12.1 | Prepare simple documents and other business communications. |  |

## Benchmark 13: Employability and Career Development: Explore, obtain, and develop strategies for ensuring a successful business career.

### Competencies

| **#** | **Description** | **Rating** |
| --- | --- | --- |
| 13.1 | Develop personal traits and behaviors to foster career advancement. |  |
| 13.2 | Demonstrate employability/career success skills. |  |

## Benchmark 14: Employability and Career Development: Demonstrate skills related to seeking and applying for employment to find and obtain a desired job.

### Competencies

| **#** | **Description** | **Rating** |
| --- | --- | --- |
| 14.1 | Create the standards and qualifications that must be met in order for entering a career. |  |

I certify that the student has received training in the areas indicated.

Instructor Signature:

For more information, contact:

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