# Common Career Technical Core Finance Pathway

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

Course Description: To be taught in all courses in the approved pathway.

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: Career REady Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 1.1 | Act as a responsible and contributing citizen and employee. |  |
| 1.2 | Apply appropriate academic and technical skills. |  |
| 1.3 | Attend to personal health and financial well-being. |  |
| 1.4 | Communicate clearly, effectively and with reason. |  |
| 1.5 | Consider the environmental,social and economic impacts of decisions. |  |
| 1.6 | Demonstrate creativity and innovation. |  |
| 1.7 | Employ valid and reliable research strategies. |  |
| 1.8 | Utilize critical thinking to make sense of problems and persevere in solving them. |  |
| 1.9 | Model integrity, ethical leadership and effective management. |  |
| 1.10 | Plan education and career path aligned to personal goals. |  |
| 1.11 | Use technology to enhance productivity. |  |
| 1.12 | Work productively in teams while using cultural/global competence. |  |

## Benchmark 2: Accounting Career Pathway Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Describe and follow laws and regulations to manage accounting operations and transactions. |  |
| 2.2 | Utilize accounting tools, strategies and systems to plan, monitor, manage and maintain the use of financial resources. |  |
| 2.3 | Process, evaluate and disseminate financial information to assist business decision making. |  |
| 2.4 | Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop an accounting career. |  |

## Benchmark 3: Banking Services Career Pathway Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Describe and follow laws and regulations to manage business operations and transactions in the banking services industry. |  |
| 2.2 | Create and maintain positive, ongoing relationships with banking customers. |  |
| 2.3 | Manage the use of financial resources to enhance banking performance. |  |
| 2.4 | Demonstrate the use of banking technology and equipment. |  |
| 2.5 | Plan, monitor and manage the day-to-day activities within a banking organization to ensure secure operations. |  |
| 2.6 | Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop a career in banking services. |  |
| 2.7 | Determine client needs and wants and respond through planned, personalized communication to guide purchase decisions and enhance future business opportunities in banking services. |  |

## Benchmark 4: Business Finance Career Pathway Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Describe and follow laws and regulations to manage accounting operations and transactions. |  |
| 2.2 | Manage the use of financial resources to ensure business stability. |  |
| 2.3 | Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop in a corporate finance career. |  |
| 2.4 | Employ risk-management strategies and techniques in corporate finance to minimize business loss. |  |

## Benchmark 5: Finance Career Cluster Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Utilize mathematical concepts, skills and problem solving to obtain necessary information for decision making in the finance industry. |  |
| 2.2 | Utilize tools, strategies and systems to plan, monitor, manage and maintain the use of financial resources. |  |
| 2.3 | Plan, staff, lead and organize human resources in finance to enhance employee productivity and job satisfaction. |  |
| 2.4 | Determine effective tools, techniques, and systems to communicate and deliver value to finance customers. |  |
| 2.5 | Create and maintain positive, ongoing relationships with finance customers. |  |
| 2.6 | Plan, monitor and manage day-to-day activities to ensure effective and efficient finance operations. |  |
| 2.7 | Implement safety, health and environmental controls to ensure a safe and productive finance work workplace. |  |
| 2.8 | Describe and follow laws, regulations and ethical standards that affect finance operations and transactions. |  |
| 2.9 | Plan, manage and maintain the use of financial resources to protect solvency. |  |
| 2.10 | Plan, organize and manage a finance organization/department. |  |
| 2.11 | Plan, monitor and manage day-to-day activities required to sustain continued business functioning. |  |
| 2.12 | Access, evaluate and disseminate financial information to enhance financial decision-making processes. |  |
| 2.13 | Manage a financial product or service mix in order to respond to market opportunities. |  |
| 2.14 | Employ financial risk-management strategies and techniques used to minimize business loss. |  |

## Benchmark 6: Insurance Career Pathway Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Describe and follow laws and regulations to manage business operations and transactions in the insurance industry. |  |
| 2.2 | Plan, monitor and manage day-to-day insurance organization activities. |  |
| 2.3 | Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop a career in insurance. |  |
| 2.4 | Demonstrate underwriting techniques and strategies to evaluate the risk posed by potential insurance clients. |  |
| 2.5 | Determine client needs and wants and respond through planned, personalized communication to guide purchase decisions and enhance future insurance business opportunities. |  |

## Benchmark 6: Securities & Investments Career Pathway Standards

### Competencies

| **#** | **DESCRIPTION** | **RATING** |
| --- | --- | --- |
| 2.1 | Describe and follow laws and regulations to manage business operations and transactions in the securities and investments industry. |  |
| 2.2 | Manage the use of financial resources to perform key duties in the securities and investments industry. |  |
| 2.3 | Plan, monitor and manage day-to-day securities and investments operations. |  |
| 2.4 | Utilize career-planning concepts, tools and strategies to explore, obtain and/or develop in a securities and investments career. |  |
| 2.5 | Determine client needs and wants and respond through planned, personalized communication to guide purchase decisions and enhance future securities and investments opportunities. |  |

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

Instructor Signature:

For more information, contact:

CTE Pathways Help Desk

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