

Financial Planning I (2025)

Understand the basics of finance. 1.00

- 1 Utilize time management skills to determine best options/outcomes. 1.01
- 2 Describe the need for financial information. 1.02
- 3 Explain the role of finance in business. 1.03
- 4 Describe the role of financial institutions. 1.04
- 5 Discuss employment opportunities in the finance industry (accounting). 1.05

Understand the basics of investing. 2.00

- 1 Explain types of financial markets (e.g., money market, capital market, insurance market, commodities markets, etc.). 2.01
- 2 Describe types of financial-services providers. 2.02
- 3 Describe types of retail/business banking products and services. 2.03
- 4 Explain types of investments. 2.04
- 5 Discuss employment opportunities in the finance industry. 2.05

Understand financial analysis. 3.00

- 1 Utilize sources of securities information to make informed financial decisions. 3.01
- 2 Acquire fundamental knowledge of investment analysis and selection to make prudent investment decisions. 3.02
- 3 Select investments to generate revenue for clients. 3.03
- 4 Acquire knowledge of securities products and benefits to support workplace activities. 3.04
- 5 Discuss employment opportunities in the finance industry (investment/securities). 3.05

Understand law and security measures in business. 4.00

- 1 Determine the relationship between government and business. 4.01
- 2 Discuss legal considerations in the finance industry. 4.02
- 3 Explain routine security precautions. 4.03

4 Follow established security procedures/policies. 4.04

5 Explain information privacy, data security, and confidentiality considerations in business. 4.05

6 Discuss employment opportunities in the finance industry (corporate finance). 4.06

Understand the impact of the economy on financial decisions. 5.00

1 Understand economic indicators to recognize economic trends and conditions. 5.01

2 Understand financial markets to recognize their importance in business. 5.02

3 Determine global trade's impact on business decision-making to acquire insight into the global forces affecting business. 5.03

4 Explain causes of stock price fluctuations. 5.04

5 Discuss employment opportunities in the finance industry. 5.05
