North Carolina CTE

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.",18%,"B2 Un Co	1 **Determine the relationship between government and business.** 4.01
	2 **Discuss legal considerations in the finance industry.** 4.02
	xplain routine security precautions. 4.03

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	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