

# CURRICULUM OVERVIEW

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## Introduction to Careers in Finance

Career and Technical Education Series



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## Introduction to Careers in Finance Course Overview

Introduction to Careers in Finance course provides the fundamentals of the financial services industry in the United States and explores the jobs and career opportunities that the industry offers.

- **Unit 1: Finance Overview and Financial Services:** Unit 1 introduces the financial services industry and the financial systems that operate in the US and internationally.
- **Unit 2: Securities Analysis and Investments:** Unit 2 examines securities markets and investment companies, looks at how companies evaluate and mitigate risk, and discusses the valuation of stocks and bonds.
- **Unit 3: Principles of Corporate Finance:** Unit 3 discusses the roles and responsibilities of corporate finance and accounting, analysis of financial statements, capital budgeting, and capital structure.
- **Unit 4: Banking Services:** Unit 4 focuses on banking services, including how the industry is organized and regulated and how risks are managed.
- **Unit 5: Risk Management and Insurance:** Unit 5 looks at the insurance industry, including how it is organized and regulated, how it addresses risks, and the career opportunities it offers.

Unit 1: Finance Overview and Financial Services		
Intro. to Careers in Finance	Assignments	
	1. Course Overview	11. Project: The Fiscal Cliff
	2. Introduction to the Financial Services Industry	12. International Finance
	3. Project: Exploring Careers in Financial Services	13. Project: When Financial Services Fail to serve the Consumer
	4. Financial System and Financial Intermediaries	14. Quiz 2: Constantly Changing Financial Systems
	5. Project: Exploring Stock Market Fraud	15. Special Project*
	6. Dynamics of Financial Services Systems	16. Test
	7. Quiz 1: Market Organization and Structure	17. Course Project Part 1: Find the Right Company*
	8. Traits for a Healthy Financial System	18. Glossary and Credits
	9. Project: Mortgage Meltdown	
	10. Financial Regulation and Compliance	

Unit 2: Securities Analysis and Investments		
Intro. to Careers in Finance	Assignments	
	1. Securities Markets and Investment Companies	9. Equity Valuation
	2. Project: When It All Goes Wrong on Wall Street	10. Project: Researching Stock Valuations
	3. Risk and Return, Efficient Diversification	11. Options and Futures Valuation
	4. Introduction to the Financial Services Industry	12. Quiz 2: Securities Valuation
	5. Project: Risk Analysis	13. Special Project*
	6. Quiz 1: Basics of Securities Analysis	14. Test
	7. Bond Valuation	15. Course Project Part 2: Explore Jobs and Careers*
	8. Project: Evaluating Bonds	16. Glossary and Credits

Unit 3: Principles of Corporate Finance		
Intro. to Careers in Finance	Assignments	
	1. Introduction to Financial Statement Analysis	9. Project: Financial Condition of the Energy Industry
	2. Project: Financial Statement Analysis	10. Dividends and Payout Policy
	3. Financial Statement Analysis	11. Project: Effects of the Mortgage Meltdown
	4. Project: Application of Ratio Analysis	12. Quiz 2: Capital Structure
	5. The Time Value of Money	13. Special Project*
	6. Quiz 1: The Finance Function and Financial Reporting and Analysis	14. Test
	7. Capital Budgeting and the Cost of Capital	15. Course Project Part 3: Prepare a Learning Plan*
	8. Financial Leverage and Capital Structure Policy	16. Glossary and Credits
Unit 4: Banking Services		
Intro. to Careers in Finance	Assignments	
	1. Organization and Structure of the Banking Industry	10. Project: Bailing Out Troubled Banks
	2. Project: Bitcoin: A New Approach to Currency	11. Asset-backed Securities, Loan Sales, and Derivatives
	3. Banking Regulation	12. Project: Bank Financial Positions
	4. Project: Exploring the Dodd-Frank Act	13. Quiz 2: Bank Risk Management
	5. Bank Financial Statements and Performance	14. Special Project*
	6. Project: Bank Solvency and Risk Measures	15. Test
	7. Quiz 1: Introduction to Banking	16. Course Project Part 4: Understand Risk*
	8. Managing Liability and Liquidity Risk	17. Glossary and Credits
	9. Managing Deposit Insurance: Bank Capital and Capital Regulation	
Unit 5: Risk Management and Insurance		
Intro. to Careers in Finance	Assignments	
	1. The Role of Insurance in Addressing Risk	9. Project: Advising the Client on an Annuity.
	2. Project: Keystone: Yes or No?	10. Government Regulation of Insurance
	3. Introduction to Risk Management	11. Project: Client Advice for Health Care Compliance
	4. Project: Risk Assessment and Mitigation	12. Quiz 2: Insurance
	5. Advanced Topics In Risk Management	13. Special Project*
	6. Quiz 1: Risk Management	14. Test
	7. Careers in Insurance	15. Course Project Part 5: Be Aware of Regulations*
	8. Financial Operations of Insurance	16. Glossary and Credits
Unit 6: Course Project, Review, and Exam		
ICF	Assignments	
	1. Course Project Part 6: Look to the Future*	3. Exam
	2. Review	

(\*) Indicates alternative assignment