



# Financial and Investment Planning

**Cluster Overview:** Careers encompass planning, services for financial and investment planning, banking, insurance, and business financial management.

**Career Goal (O\*NET Code):** Financial Manager (11-3031), Brokerage Clerk (43-4011), Cost Estimator (13-1051), Financial Advisor (13-2052), Commodities Agent (41-3031).

**Student Name:** \_\_\_\_\_

**Grade:** \_\_\_\_\_

**School:** \_\_\_\_\_

## SUGGESTED COURSEWORK

## EXTENDED LEARNING EXPERIENCES

Middle School	8th	HS Courses:				Curricular Experiences:	Extracurricular Experiences:
High School	9th	<b>Core Courses:</b>	English I	World Geography	Professional Communications	<a href="#">Business Professionals of America</a> <a href="#">DECA</a> <a href="#">Family, Career and Community Leaders of America</a> <a href="#">Future Business Leaders of America</a>	Academic Decathlon Language Immersion Programs Math Tutor School Newspaper Student Government UIL Academic Competitions Yearbook  <b>Service Learning Experiences:</b> Boy Scouts of America Campus Service Organizations Community Service Volunteer Girl Scouts of the USA Peer Mentoring / Peer Tutoring
		<b>Career-Related Electives:</b>	Algebra I	Physical Education			
		Biology	Languages other than English I				
	10th	<b>Core Courses:</b>	English II	World History		<b>Career Learning Experiences:</b> Career Preparation Internship Job Shadowing	
		<b>Career-Related Electives:</b>	Principles of Business, Marketing and Finance or Introduction to Business Documents	Chemistry	Languages other than English II		
		Business Information Management I or Accounting I					
	11th	<b>Core Courses:</b>	English III	United States History		<b>COLLEGE CREDIT OPPORTUNITIES -- High School</b>  Students should take Advanced Placement (AP), International Baccalaureate (IB), dual credit, Advanced Technical Credit (ATC), or locally articulated courses (Tech Prep), if possible. List those courses that count for college credit on your campus.	
		<b>Career-Related Electives:</b>	Algebra II				
		Physics					
	12th	<b>Core Courses:</b>	English IV	Government/Economics			
<b>Career-Related Electives:</b>		Precalculus	Fine Arts				
	Environmental Systems						
	Banking and Financial Services or Business Law or Career Preparation						
On-the-Job Training	Bookkeeper		Data Entry Verification Clerk	Payment Clerk	<b>Professional Associations:</b> <a href="#">American Academy of Financial Management</a> <a href="#">American Institute of Certified Public Accountants</a> <a href="#">American Society of Pension Professionals and Actuaries</a> <a href="#">Certified Financial Planner Board of Standards</a> <a href="#">Financial Planning Association</a> <a href="#">Phi Beta Lambda</a> <a href="#">Registered Financial Planners Institute</a> <a href="#">Society of Financial Service Professionals</a>		
	Billing Clerk						
Certificates	A*S*K*	Internet and Computing Core	OSHA CareerSafe				
	Bookkeeping Fundamentals	Microsoft Office Specialist	Sales Professional				
	NOTE: These experiences may be started and/or completed as part of the high school experience.						
	NOTE: Students may earn all or part of these certificates as part of the high school experience.						
Postsecondary	Associate Degrees	<a href="#">Accounting</a> <a href="#">Administrative/Secretarial Services</a>	<a href="#">Business Administration</a> <a href="#">Data Processing Services</a> <a href="#">Financial Management and Services</a>	<a href="#">Mathematics</a> <a href="#">Law and Legal Studies</a> <a href="#">Real Estate</a>	<b>Career Options:</b> Tax Clerk Loan Specialist Records Analyst Tax Technician Call Center Coordinator Personal Banker		
	Bachelor Degrees	Accounting Economics Finance	Financial Management Financial Services	Mathematics - Actuarial Studies Real Estate Finance	<b>Career Options:</b> Risk or Profit Analyst Investment Analyst Financial Planner or Advisor Internal Revenue Agent International Tax Preparer		
	Graduate Degrees	Accounting - Taxation Business Administration - Finance	Finance Management - Financial Planning	Public Administration Taxation	<b>Career Options:</b> Financial Reserve Officers Contract Intermediator Certified Public Accountant Investment Fund Manager Business Tax Adviser		

Students may select other elective courses for personal enrichment purposes.

This plan of study serves as a guide, along with other career planning materials, for pursuing a career path and is based on the most recent information as of 2009. All plans meet high school graduation requirements as well as college entrance requirements.