



monarch

Curriculum Catalog

Career and Technical Education Series

Introduction to Careers in Finance

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Introduction to Careers in Finance Course Overview

The 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 introduces the financial services industry and the financial systems that operate in the US and internationally.

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 discusses the roles and responsibilities of corporate finance and accounting, analysis of financial statements, capital budgeting, and capital structure.

Unit 4 focuses on banking services, including how the industry is organized and regulated and how risks are managed.

Unit 5 looks at the insurance industry, including how it is organized and regulated, how it addresses risks, and the career opportunities it offers.

Objectives

- Explain the financial system.
- Evaluate career opportunities in financial services.
- Describe the role of intermediaries in finance.
- Examine and define the key agencies governing US banking and securities industries.
- Characterize the impact of international finance on US financial system regulations.
- Review the attributes of a well-functioning financial system.
- Evaluate the role of regulatory bodies in ensuring compliance with regulations.
- Identify the importance of transparency in the financial system.
- Identify different types of securities and markets.
- Describe how diversification works with risk and return.
- Discuss how to analyze a bond for investment purposes.
- Describe, compare, and apply the main techniques used for equity valuation.
- Analyze the methods used to assess the value of a futures contract.
- Discuss the roles and responsibilities of corporate finance.
- Create a framework to understand the analysis of financial statements.
- Describe how money grows over time when invested through compounding.
- Identify issues affecting the cost of capital.
- Describe the elements of a company's capital structure.
- Explain how a company can use its profits to increase its value.
- Describe the nature, structure, and functions of banking firms.
- Explain how banks mitigate their risks.
- Describe the role of the Federal Reserve in supporting banks.
- Summarize the nature and types of risks faced by businesses and how they use insurance to manage those risks.
- Explain nontraditional risks and how companies address them.
- Summarize the types of jobs and careers offered by insurance companies.
- Discuss the role of state insurance commissioners in regulating insurance companies.

Unit 1: Finance Overview and Financial Services	
Intro. to Careers in Finance	Assignments
	1. Course Overview
	2. Introduction to the Financial Services Industry
	3. Project: Exploring Careers in Financial Services
	4. Financial System and Financial Intermediaries
	5. Project: Exploring Stock Market Fraud
	6. Dynamics of Financial Services Systems
	7. Quiz 1: Market Organization and Structure
	8. Traits for a Healthy Financial System
	9. Project: Mortgage Meltdown
10. Financial Regulation and Compliance	
11. Project: The Fiscal Cliff	
12. International Finance	
13. Project: When Financial Services Fail to serve the Consumer	
14. Quiz 2: Constantly Changing Financial Systems	
15. Special Project*	
16. Test	
17. Course Project Part 1: Find the Right Company*	
18. Glossary and Credits	
Unit 2: Securities Analysis and Investments	
Intro. to Careers in Finance	Assignments
	1. Securities Markets and Investment Companies
	2. Project: When It All Goes Wrong on Wall Street
	3. Risk and Return, Efficient Diversification
	4. Introduction to the Financial Services Industry
	5. Project: Risk Analysis
	6. Quiz 1: Basics of Securities Analysis
	7. Bond Valuation
8. Project: Evaluating Bonds	
9. Equity Valuation	
10. Project: Researching Stock Valuations	
11. Options and Futures Valuation	
12. Quiz 2: Securities Valuation	
13. Special Project*	
14. Test	
15. Course Project Part 2: Explore Jobs and Careers*	
16. Glossary and Credits	
Unit 3: Principles of Corporate Finance	
Intro. to Careers in Finance	Assignments
	1. Introduction to Financial Statement Analysis
	2. Project: Financial Statement Analysis
	3. Financial Statement Analysis
	4. Project: Application of Ratio Analysis
	5. The Time Value of Money
	6. Quiz 1: The Finance Function and Financial Reporting and Analysis
	7. Capital Budgeting and the Cost of Capital
8. Financial Leverage and Capital Structure Policy	
9. Project: Financial Condition of the Energy Industry	
10. Dividends and Payout Policy	
11. Project: Effects of the Mortgage Meltdown	
12. Quiz 2: Capital Structure	
13. Special Project*	
14. Test	
15. Course Project Part 3: Prepare a Learning Plan*	
16. Glossary and Credits	
Unit 4: Banking Services	
Intro. to Careers in Finance	Assignments
	1. Organization and Structure of the Banking Industry
	2. Project: Bitcoin: A New Approach to Currency
	3. Banking Regulation
	4. Project: Exploring the Dodd-Frank Act
	5. Bank Financial Statements and Performance
	6. Project: Bank Solvency and Risk Measures
	7. Quiz 1: Introduction to Banking
	8. Managing Liability and Liquidity Risk
9. Managing Deposit Insurance: Bank Capital and Capital Regulation	
10. Project: Bailing Out Troubled Banks	
11. Asset-backed Securities, Loan Sales, and Derivatives	
12. Project: Bank Financial Positions	
13. Quiz 2: Bank Risk Management	
14. Special Project*	
15. Test	
16. Course Project Part 4: Understand Risk*	
17. Glossary and Credits	

Unit 5: Risk Management and Insurance	
Intro. to Careers in Finance	Assignments
	1. The Role of Insurance in Addressing Risk
	2. Project: Keystone: Yes or No?
	3. Introduction to Risk Management
	4. Project: Risk Assessment and Mitigation
	5. Advanced Topics In Risk Management
	6. Quiz 1: Risk Management
	7. Careers in Insurance
8. Financial Operations of Insurance	
9. Project: Advising the Client on an Annuity.	
10. Government Regulation of Insurance	
11. Project: Client Advice for Health Care Compliance	
12. Quiz 2: Insurance	
13. Special Project*	
14. Test	
15. Course Project Part 5: Be Aware of Regulations*	
16. Glossary and Credits	

Unit 6: Course Project, Review, and Exam	
ICF	Assignments
	1. Course Project Part 6: Look to the Future*
	2. Review
	3. Exam

(*) Indicates alternative assignment