



# 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	<b>HS Courses:</b>	Touch Systems Data Entry		<b>Curricular Experiences:</b> <a href="#">Business Professionals of America</a> <a href="#">DECA</a> <a href="#">Family, Career and Community Leaders of America</a>	<b>Extracurricular Experiences:</b> Academic Decathlon Language Immersion Programs Math Tutor School Newspaper Student Government UIL Academic Competitions Yearbook
	High School	9th	<b>Core Courses:</b>	English I Algebra I or Geometry Biology		
<b>Career-Related Electives:</b>			Principles of Business, Marketing and Finance and Business Law			
10th		<b>Core Courses:</b>	English II Geometry or Alg II Chemistry	World History Languages other than English II		
		<b>Career-Related Electives:</b>	Business Information Management I or Accounting I			
11th		<b>Core Courses:</b>	English III Algebra II, Pre-Cal, or Math Models Physics or Princ of Technology	United States History Professional Communications		
		<b>Career-Related Electives:</b>	Business Information Mangamenet II			
12th	<b>Core Courses:</b>	English IV Alg III, Pre-Calculus, or AP Calculus Science Elective	Government/Economics Fine Arts			
	<b>Career-Related Electives:</b>	Accounting II				
Postsecondary	On-the-Job Training	Bookkeeper Billing Clerk	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>	
	Certificates	A*S*K* Bookkeeping Fundamentals	Internet and Computing Core Microsoft Office Specialist	OSHA CareerSafe Sales Professional		<b>Career Options:</b> Tax Clerk Sales Agent Customer Service Associate
	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> 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		

**Career Learning Experiences:**  
 Career Preparation  
 Internship  
 Job Shadowing

**COLLEGE CREDIT OPPORTUNITIES -- High School**  
 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.

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.