



Finance

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's Name: _____ **Date:** _____
School: Mabank High School **Grade:** 9th 10th 11th 12th AR
Primary Endorsement: Business & Industry **Additional Endorsements:** Arts & Humanities Multidisciplinary
 Public Service STEM
Parent's Signature: _____ **Student's Signature:** _____

SUGGESTED COURSEWORK

EXTENDED LEARNING EXPERIENCES

Middle School	8th	HS Courses:	Algebra I Art I Health	Spanish I Touch Systems Data Entry	<p>Curricular Experiences: Business Professionals of America DECA Family, Career and Community Leaders of America</p> <p>Career Learning Experiences: Career Preparation Internship Job Shadowing</p> <p>Extracurricular Experiences: Academic Decathlon Language Immersion Programs Math Tutor School Newspaper Student Government UIL Academic Competitions Yearbook</p> <p>Service Learning Experiences: Boy Scouts of America Campus Service Organizations Community Service Volunteer Girl Scouts of the USA Peer Mentoring / Peer Tutoring</p>
High School	9th	Core Courses:	English I Algebra I or Geometry Biology	World Geography Languages other than English I Physical Education	
		Career-Related Electives:	Principles of Business, Marketing and Finance (MRKG1311 & BMGT1327) Business Information Management I		
	10th	Core Courses:	English II Geometry or Alg II IPC or Chemistry	World History Languages other than English II	
		Career-Related Electives:	Business Information Management II Accounting I (ACNT1303 & ACNT1304)		
	11th	Core Courses:	English III Algebra II, Math Models, or Pre-Cal Physics	United States History Languages other than English III	
		Career-Related Electives:	Business Law (BMGT1341) Accounting II (ACNT1311 & ACNT1313)		
	12th	Core Courses:	English IV Alg II, Pre-Calculus, AP Calculus, AP Statistics or Math Elective Science Elective	Government/Economics Fine Arts Languages other than English IV	
		Career-Related Electives:	Practicum in Business Management Stats & Business Decision Making		

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.

	Practicum and/or Work-Based Experiences	Bookkeeper Billing Clerk	Data Entry Verification Clerk	Payment Clerk	<p>Professional Associations: American Academy of Financial Management American Institute of Certified Public Accountants American Society of Pension Professionals and Actuaries Certified Financial Planner Board of Standards Financial Planning Association Phi Beta Lambda Registered Financial Planners Institute Society of Financial Service Professionals</p>
	Certificates	A*S*K* QuickBooks	Internet and Computing Core Microsoft Office Specialist	OSHA CareerSafe Sales Professional	
Postsecondary	Associate Degrees	Accounting Administrative/Secretarial Services	Business Administration Data Processing Services Financial Management and Services	Mathematics Law and Legal Studies Real Estate	<p>Career Options: Loan Specialist Records Analyst Tax Technician Call Center Coordinator Personal Banker</p>
	Bachelor Degrees	Accounting Economics Finance	Financial Management Financial Services	Mathematics - Actuarial Studies Real Estate Finance	<p>Career Options: Risk or Profit Analyst Investment Analyst Financial Planner or Advisor Internal Revenue Agent International Tax Preparer</p>
	Graduate Degrees	Accounting - Taxation Business Administration - Finance	Finance Management - Financial Planning	Public Administration Taxation	<p>Career Options: Financial Reserve Officers Contract Intermediator Certified Public Accountant Investment Fund Manager Business Tax Adviser</p>

This program of study (POS) serves as a guide, along with other college and career planning materials, for pursuing college and career goals. POS developed 2017. A Business & Industry endorsement as defined in 19 TAC 74.13(f)(2)(A) requires a coherent sequence of courses for four or more credits in career and technical education (CTE) that consists of at least two courses in the least one advanced CTE same career cluster, including at course, which includes any course that is the third or higher course in a sequence. The final courses in the sequence must be obtained from one of the Finance career cluster.